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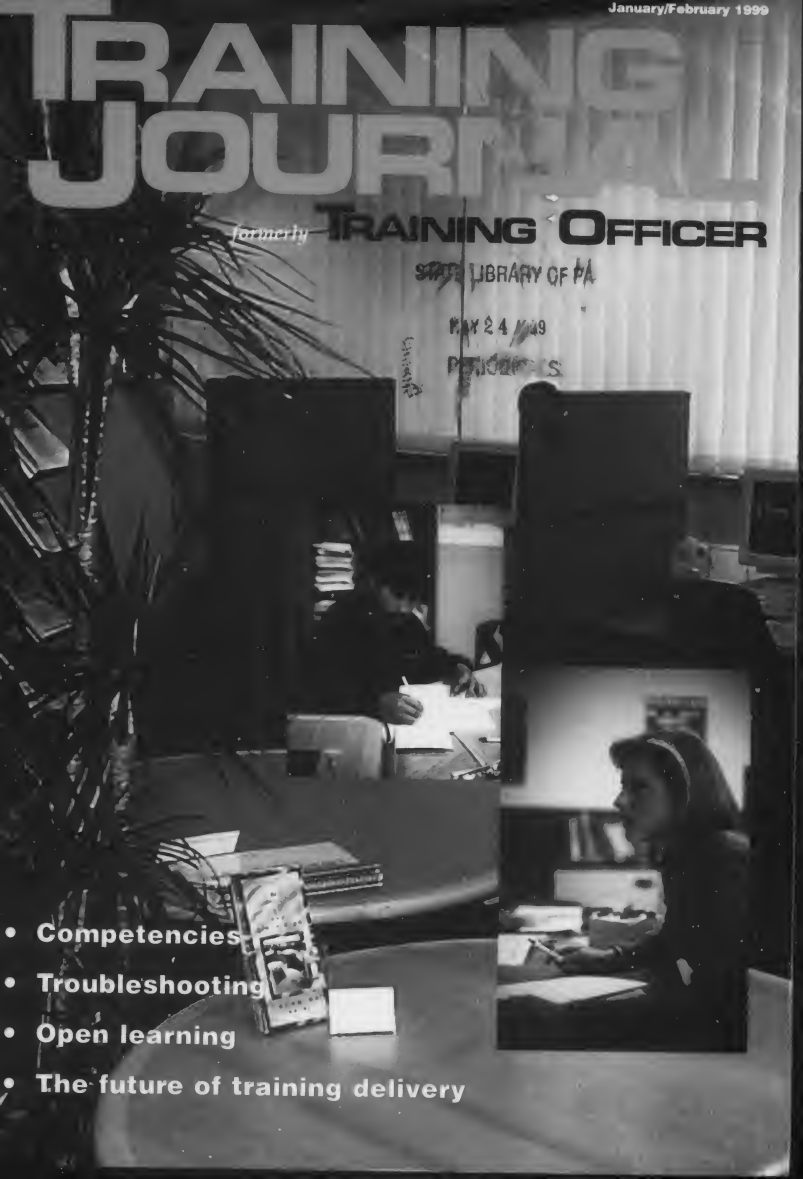

- Competencies
- Troubleshooting
- Open learning
- The future of training delivery

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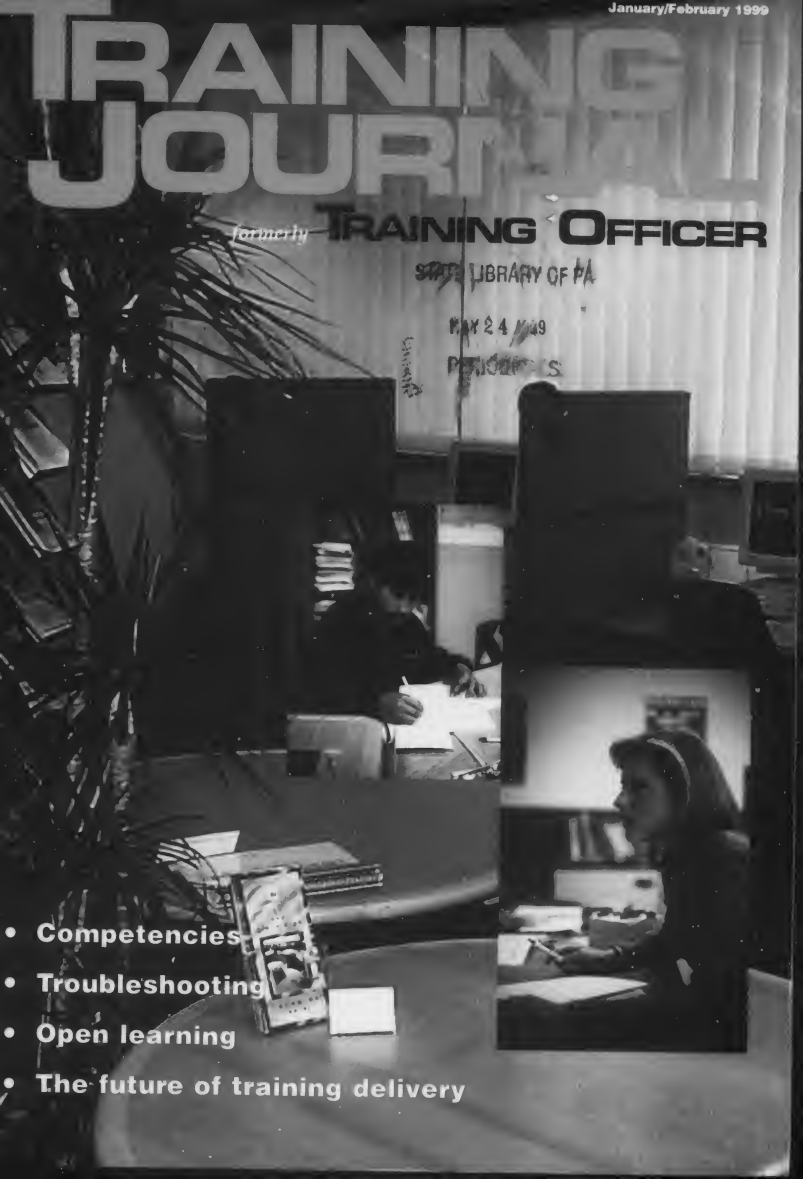

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Dates for your diary *Inside back cover*

Front Cover
Main photograph courtesy of the Automobile Association.
Photographer: Tim J Ward
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Letter from the editor

Happy New Year and welcome to the first issue of *Training Journal*. We hope that you like the new name.
It does not in any way reflect a departure from the ethos of *Training Officer*, which had so many loyal readers.
Many of you will know that Training Officer was first established in 1965 as the official journal of the British Institution of Training Officers. This later became the Institute of Training and Development, but following a parting of ways Training Officer quite soon established itself as the leading independent journal for trainers.

We plan to build on that success and in the coming months we shall bring you a wide range of topical articles based on current day practice and trends in training. Our aim is to continue to offer a publication that can be enjoyed by all those who have an interest in professional training.

In this issue of the journal we are looking in depth at competencies, particularly at how to train people in using competency frameworks as well as how to build competency maps. There's an interesting article about troubleshooting for trainers, which will strike a chord with all those who at some time find themselves in situations for which they are not prepared. We are also bringing you the benefit of the experience of a manager of a learning centre, who advises on how to run one successfully.

But most important of all is that *Training Journal is yours*. Please write (or send an e-mail) to me if you have any news, views or ideas that you would like to share with fellow readers.

Sylvia Worth

Sylvia Worth

Modern Apprenticeships — the popular choice for school leavers

Modern Apprenticeships are proving to be a most popular option for school leavers according to two new surveys of Modern Apprenticeships among employers and young people. The surveys show that MAs provide a balanced and structured training programme in which trainees obtain a sense of achievement. The appeal for young people is the acquisition of job-related skills, qualifications and experience and the enhancement of career prospects. The majority of young people interviewed expected to stay with their present employer. Many said they felt the MA would lead to future training beyond apprenticeship, to higher level NVQs or a university degree and that MAs raised the quality of training. Companies said that they had introduced MAs to develop new skills and enable company expansion:

- 73 per cent of employers said MAs led to improvement in quality or quantity
- 63 per cent of employers said MAs improved existing training provision
- two thirds said MAs offered a more broad-based training programme, enhanced general skills of the workforce and produced better-qualified staff.

The 'Survey of employers' was undertaken by Economic Research Services (ERS). Information was collected by telephone interviews with 1500 employers and face-to-face interviews with 200 employers across a range of framework sectors.

The 'Survey of young people' was undertaken by the British Market Research Bureau (BMRB). Three thousand apprentices and 1600 young people in schools and colleges in their first year of 'A' levels and/or Advanced GNVQs returned questionnaires.

Copies of both reports are available from DfEE Publications, PO Box 5050, Sudbury, Suffolk CO10 6ZQ; tel 0845 602 22760.

Cash for vital New Deal skills training

The Government has announced that employers who offer permanent jobs to young people under the New Deal will receive money for training, in a bid to help solve skill shortages. Known as the Upfront Skills Shortage Subsidy, the money will address the problems some employers encounter when recruiting employees who need precise skills and require a significant amount of upfront training. The payment gives further encouragement to employers to consider training and taking on unemployed people through the New Deal.

Through the subsidy employers will receive three quarters of the training and subsidy payments at the start of the job. This will total £1,730 for 18–24 year olds and £1,460 for people on New Deal aged 25 plus. The remaining quarter will be paid after 26 weeks, on achievement of the agreed training objectives. Any employers facing a skill shortage can receive the training and subsidy payments as long as they can provide a New Dealer with a permanent job lasting a year or more. The employer must provide at least 15 days training in the first eight weeks and 26 days or more during the first six months of employment.

Postbag: If you would like to share your views with other readers of TRAINING JOURNAL, please send your letters to The Editor, Postbag, Training Journal, Clive House, The Business Park, Ely, Cambridgeshire CB7 4EH.

Alternatively, fax 01353 663644 or e-mail: trainingjournal@fenman.co.uk

£725 million boost for FE

The Government has announced that further education colleges will have £725 million more over the next two years. There will be an extra £255 million in 1999-2000 and £470 million in 2000-2001 to improve standards, widen participation and modernise equipment and buildings. Part of the package is a new FE Standards Fund of £35 million in 1999-2000 and £80 million in 2000-2001.

£25 million for Disability Rights Commission

The Government has pledged £25 million to work towards eliminating discrimination against disabled people and to help employers and service providers to meet their obligations under the law. The Disability Rights Commission will be given £3 million to establish itself in 1999–2000. Its running costs will be £11 million in 2000–2001. A further £11 million has been provisionally set aside for 2001–2002.

Minister recognises the 'Learning Owner Manager' at the Bank of England

Nine owner managers of small businesses and seven business support professionals have received achievement awards, which recognise success through personal development. All the winners had been involved in development programmes of the Small Firms Enterprise Development Initiative (SFEDI). Barbara Roche, Minister for Small Firms, and Eddie George, Governor of the Bank of England — the host organisation — made the presentations.

1998 Gala Awards

Seejal Hindowcher from Harlow, received the Gardner Merchant Management Trainee of the Year Award at the 1998 Gala Awards. Seejal was presented with her award by Garry Hawkes, Gardner Merchant Chairman, at a ceremony in London's Battersea Park.

New Deal spreads jobs hope?

The Government's recently released figures show that in those areas of the country in which the New Deal is working successfully, some 40 per cent or more young people have been helped into jobs after six months. Equally, however, the figures show that there are other delivery units that need to improve on the performance shown in these early figures. In total, since the New Deal began, 38,400 young people have gone into jobs and 22,430 have gone into education and voluntary options. The true cost of the jobs secured so far is currently around £1,000 per job.

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IN BRIEF

Buckinghamshire Business School is to offer a degree in small business management for the managers of small and medium sized businesses in the newly emerging commercial markets in Russia. Training will take place at the Novgorod State University near St Petersburg. This has been made possible by a grant through the Know How Fund's Regional Academic Partnership Scheme.

International cross-cultural training and development consultancy, TMA, has won a contract to provide a training programme for British Airways' 14,000 cabin crew world-wide. The half-day programme will run for 18 months and is part of a wider one-day course to support BA's globalisation strategy. The programme aims to encourage a 'global mindset' through exercises that explore globalisation and its implications for business.

The College of Railway Technology has been relaunched as Catalis Rail Training, reflecting the expanded range of services developed to meet the changing needs of the rail industry.

Inova Knowledge Management (IKM) has signed a partnership agreement with computer based training specialists, Pathlore Software, which will allow IKM to use web-based systems to deliver knowledge management and management development services to their clients.

At a meeting held in November of last year the Open & Distance Learning Quality Council agreed to re-accredit the Open Learning Centre International, the KLC School of Design and Henley College Coventry's programme of Homestudy and Distance Learning. The Airline Recruitment & Training Company also received accreditation.

The Royal National Institute for the Blind's Employment and Student Support Network has been recognised as Investors in People.

Report shows skills gap is at its lowest since 1994

Sixty-five per cent of workplaces now have training plans, according to the findings of a recently published report — *Skill Needs in Great Britain and Northern Ireland 1998*. The report also shows that the gap between the type of skills current employees have now and those required to meet business objectives, is at its lowest since 1994, with 15 per cent of employers reporting the existence of a skills gap, compared with 18 per cent last year.

Those in professional occupations and technical staff have replaced managers and administrators as the groups most frequently trained.

Whilst skill supply in the jobs market is going up generally, 23 per cent of employers in the survey report they have hard-to-fill vacancies, up noticeably from 18 per cent last year.

The top ten occupations in which employers report a skills gap include clerks, engineers and technologists, computer analysts and programmers, assistant nurses, hospital ward assistants, ambulance staff, care assistants, teaching professionals, chefs, waiters, bar staff, bus inspectors and conductors, bus and coach drivers, specialist managers, receptionists and telephonists and finally sales and service. Recruiting staff with the right skills for the job proves most tricky in the East Midlands and in the services sector in both low and high skilled jobs. According to employers, three out of five recruitment dilemmas are due to lack of suitably qualified applicants.

Copies of the report are available from IFF Research Ltd, 26 Whiskin Street, London EC1R OJD.

£50 million for higher education employability initiative

A new fund to boost technology transfer and graduate employability in the knowledge age was announced recently as part of the Government's Competitiveness White Paper. The new Higher Education Reach Out Fund (HERO), funded by the Department for Education and Employment and the Department of Trade and Industry, will help higher education respond better to business needs.

Over the next three years, the Government will be investing £50 million in the Fund; £10 million this year, rising to over £20 million in 2001-2002. The Department of Trade and Industry is also contributing. It is envisaged that 'Reach Out' will improve the interaction between higher education and business to enhance the employability of students and facilitate technology transfer. It will help the access and use by business of HE's graduates, products, resources and service. The Fund, which will come into operation next year, will support:

- activities which increase the number, range, quality and flexibility of opportunities for students to gain supported work experience and to learn from that experience
- projects to help all students gain the key skills that business needs
- activities to ensure that higher education provides relevant, accessible and flexible courses to help those in work develop their existing skills. The first projects are intended to start in autumn 1999.

New NVQ Level 5 in training and development

A City & Guilds NVQ Level 5 has officially been launched in Training and Development Strategy, aimed at those who have a strategic responsibility in human resource development. Following an 18-month pilot phase through carefully selected centres, 17 successful candidates were presented with their certificates at an event held recently in London tor the launch of the award.

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Come out with your learning resolutions!

Happy New Year! By now you will have decided on your New Year resolutions and, possibly, even had time to forget them or to deviate from them. Resolutions, as we all know, have a nasty habit of being entirely laudable but failing to be translated into practice. There is what you resolved to do; what you actually did do (or did not do); and the difference between the two! The question is why there is so often a gap between the resolution and its successful implementation.

In common with most people, I have had my ups and downs with resolutions. Only the other day I was working in a hotel that had bowls of mints within easy reach. In normal circumstances I never ever think about mints. I neither crave for them nor miss them — until, that is, there is a bowl of them right beside me. I know they aren't very good for me, but I have learned from past experience that I am incapable of having just one mint. If I allow myself to succumb, I instantly become a mintaholic, with an insatiable appetite for mints, and will go sucking one after another until the roof of my mouth becomes sore. I know this is silly, so I resolve not to allow myself to eat a single mint. Armed with my resolution, the battle to implement it is on.

Now, I've found my resolutions fall into two categories. Those that are a good idea but I don't really want to implement and those that are a good idea and I really, really do want to implement. Needless to say, the first sort of resolution is particularly prone to failure, but I have found a simple way to bolster even half-hearted resolutions. All I have to do is go public. My resolve not to eat mints, even when surrounded by people eating them with obvious relish, is instantly made more robust by the mere act of telling people, who are in a position to monitor my behaviour, that I have made it. This elevates the resolution into a different league. It seems silly to eat mints when you don't need them and it seems even sillier to eat mints when you have told everyone you are not going to!

The same extends, I find, to New Year resolutions. If I make clandestine ones that only I know about, I am far more likely to fail than if I tell significant people in advance what I am going to do. Many years ago, for example, when I first resolved to keep a learning log, if I'm honest, I was half-hearted. I knew it was a good thing to do but didn't relish investing the time and energy it would take. So I soon became a lapsed learning log keeper. Eventually, stricken with guilt and disgusted at my failure, I reviewed the situation and decided I had made two mistakes. Firstly, I had been too ambitious in committing myself to a daily learning log entry (I throttled it back to a more reasonable three per week). Secondly, I had given myself too much take-it-or-leave-it discretion with no inconvenient consequences if I left it. I therefore told a number of colleagues that I was going to produce at least three learning log entries each week and instigated a follow-up system. The whole thing was instantly easier to sustain, once I had made my commitment public.

Hopefully you have seen the coverage in the national press, masterminded by the Campaign for Learning, encouraging everyone to set themselves a New Year learning resolution. An excellent idea so long as you stick to the five L- E- A- R -N criteria.*

In my experience resolutions that work are:

- **L** for *Limited* — my rule is to have a maximum of three resolutions
- **E** for *Exact* — each resolution should be specific, with i's dotted and t's crossed
- **A** for *Appropriate* — each resolution should dovetail with your needs
- **R** for *Realistic* — resolutions should be feasible, taking account of all constraints / circumstances
- **N** for *Now* — my rule is that the best resolutions start immediately without a wait before implementation.

My learning resolutions for 1999? I thought you'd never ask! As you know, I'm keen to tell so that it makes it more likely I will implement them successfully.

- *Learning resolution 1* — to keep up my learning log routine (minimum of three written entries per week)
- *Learning resolution 2* — each week to take one lesson learned and ask 'In how many ways could I apply this learning?'
- *Learning resolution 3* — each month to pose the question 'What have I learned about how I and others learn?'

If you want to know how I get on, don't wait for a year to ask me. I'd find it far more helpful if you checked up on me after, say, just four weeks. Let me know your learning resolutions and I'll return the favour.

*A mnemonic invented for Fenman's video *The Learning Plan Interview*.

For details about the Campaign for Learning contact Bill Lucas or Michelle Wake at 19 Buckingham Street, London NW2N 6EF; telephone 0171 930 1111; fax 0171 930 1551 e-mail cflearning.org.uk

Training competency frameworks

In this article **Mark Briegal** looks at how best to train managers (or supervisors or others with responsibility for recruiting and/or managing staff) in using competency frameworks.

So, you've been asked by your biggest client, or your MD, to come up with something to introduce a competency framework into the organisation. As trainers, we are seeing more and more organisations becoming interested in introducing competency frameworks. So, what is the best way to train users in competencies?

I have assumed that the organisation's HR function and senior management team understand competencies and their uses, or else the training should not have been commissioned!

What sort of competency training or workshop?

The starting point for deciding on how to introduce competencies into an organisation is to decide upon why they are being used and how much knowledge managers have of the underlying processes.

For example, to add competencies into an existing appraisal system may take one day, assuming that the managers being trained are conversant with agreeing objectives, reviewing development needs and conducting an interview.

Where the process is completely new, a longer period will be required. For example, to introduce a new performance review system using a competency based approach, and where no existing process is in place, will take at least two days.

The next issue to consider is whether the organisation has already developed a competency framework of its own or whether the trainer is to facilitate the construction of one. A middle ground exists where a draft framework is proposed and used in the training and any changes suggested in that training are incorporated into the framework. The advantages of such a process are that the time-frames are shortened and those being trained feel more involved in the process. This will give them more ownership of the system and therefore ensure its introduction is more effective.

These two issues can be grouped together diagramatically, as shown in Figure 1.

Mark Briegal has an MA from Cambridge University and an MBA from Manchester Business School. Following a career in international banking, he founded Mark Briegal Training in 1990. Mark may be contacted on 01925 602524; fax on 01925 602196 or by e-mail to briegal@mail.talk-101.com

	Have framework	Do not have framework
Have skills	Conversion workshop concentrating on competencies and how to use them and their impact on the skills	Conversion workshop on competencies, defining a framework, how to use them and their impact on the skills
Do not have skills	Training programme covering competencies and how to use them with special emphasis on the skill set to draw out and develop competencies	Training programme covering competencies, defining a framework, and how to use them with special emphasis on the skill set to draw out and develop competencies

Figure 1. Introducing competencies into an organisation

What makes a great start?

As with any training programme or workshop, the style must be as practical and hands-on as possible to help with the learning, whilst appealing to as many learning styles as possible.

We have found that going straight into an exercise, after the appropriate introductions, is a good way of getting into the topic. Trying to explain the concept cold, especially first thing in the morning, is quite difficult and delegates enjoy a fun exercise.

Given this, it may be useful to be quite vague about what competencies are in your introduction and to keep it as short as possible so that the delegates start the exercise without having thought too much about the process.

The exercise can be run several different ways, but concentrates on the main theme of 'What makes a great…?'. Organise the delegates into syndicates and give them appropriate examples to work on. If the group like sports, ask them 'What makes a great footballer?'. For instance, what separates a Pele or Michael Owen from people who kick about in the park? If the delegates are a social bunch, ask them 'What makes a great barman?'. 'What makes a great teacher?' and 'What makes a great receptionist?' are all possible, as are many others. It is important at this stage not to get too close to their own industry, sector or function. That is, do not ask a group of accountants, 'What makes a great accountant?'.

If you have a large group, get them into four or five syndicates and give each one a flipchart and ask them a different 'What makes a great…?' question. If you have a smaller group you can get them to compare. Draw a line down the flipchart and compare a footballer with a golfer (or any other sport), or compare a teacher to a barman or any other combination that will appeal to your group. See Figure 2.

What makes a great footballer?	What makes a great golfer?

Figure 2. A comparison

Similarities	Differences
Knows rules Reads the game or course, etc. Will to win Self control Dedication Team player (if appropriate)	Rules of the game Equipment or clothing Specific skills for the sport

Figure 3. An example of the sports solution

The link into competencies

The aim of the exercise is to demonstrate from first principles that those attributes that separate the great from the ordinary are not just skills or knowledge, but are mainly the competencies, and that these will be similar, regardless of sport or job role.

So, once delegates have completed the exercise, get them to draw out the similarities and differences. If they have compared roles in small groups, as in Figure 2, this will be a case of circling similarities and differences on their flipchart. If different groups have different roles, then they can go round the room and circle words that are the same (or very similar) to their own on other flipcharts. This is reasonably chaotic but fun!

This should prove the point that some of the 'things' (for they are only 'things' at this stage) that separate the great from the ordinary are the same, whether they are athletes, bar staff, teachers etc. At a later stage these will become competencies.

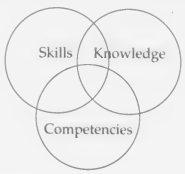
These can then be listed on a flipchart to pull together the views of the group. An example of the sports solution is shown in Figure 3.

The models

Once you have deduced the concept of competencies from first principles, these can be reinforced by some of the competency models. The main model used is based on the much-used *Skills, Knowledge and Attitude Venn Diagram*, but adapted to 'Competencies' rather than 'Attitude'. This is shown in Figure 4. The word 'attitude' tends to be negative, especially when a manager says to his/her staff member, "I want to talk to you about your attitude!". The response will probably be very defensive.

We encourage delegates to talk to staff about behaviour rather than attitude. You cannot easily alter personality (nor should you try to) but you can influence people's behaviour.

If you then ask the delegates to think about a difficult person they have had to



The competencies can best be described as ***The ability or motivation to apply skills of knowledge.***

Skills are an individual's ability to perform particular physical or mental tasks
Knowledge is the information that an individual knows and uses
Competencies are the way an individual behaves while performing the job

The intersection of the three circles is effective job performance.

Figure 4. Main competency model

work with, or a poor performer, and then ask them whether the individual was difficult or a poor performer because of a lack of skills, a lack of knowledge or a lack of competencies, the usual response will be competencies.

This can then be expanded; ask the delegates what the development solution will be for a lack of each. An example is set out in Figure 5.

A lack of competency is often revealed by the, 'They're very good at their job, but…' type of comment.

An alternative model for competencies is a stool where skills, knowledge and competencies are the three legs and where the seat is effective job performance. This is shown in Figure 6.

There are three other models that may come in handy, depending on the level of training that you are carrying out. One model puts competencies into context with the skills and knowledge required for the job, as shown in Figure 7.

The point of this model is that skills and knowledge are at the top of the triangle, or the tip of the iceberg, supported by the underlying competencies, which in turn are supported by the inherent motives and values of the individual. Skills and knowledge are conscious and relatively easy to develop, whereas motives and values are more subconscious and not easy to develop. Competencies, sit in the middle.

As competencies are less conscious it is often more difficult to get individuals to acknowledge their need to develop them. Skills and knowledge are conscious and it is easy to test whether they are in place. For example, you can give a welder two pieces of metal and an arc welder and then test the quality of the weld; or you can give office workers some numbers and a spreadsheet package and ask them to produce a graph. It is harder to test teamworking skills or communication skills.

It may be worth getting delegates to think about the difference between skills and competencies. This is especially important as some of the commonly used competencies have the word 'skills' in their description. For example, we talk about communication skills and teamworking skills, both of which are really competencies (although they do, of course, have an element of skill within them, which is why Figure 4 is shown as a Venn Diagram).

An alternative model (source unknown) is shown in Figure 8. This pulls together all the factors that affect performance and again gives delegates an idea of where gaps in performance may be and what levers they can pull to improve performance.

Figure 9 shows a model by Fombrun *et al*, which takes the principles a step further and puts performance in a wider organisational context. It is up to you to decide which models make sense for you to use, depending on your audience and what you are trying to achieve.

The link to the organisational system

Once you are happy that your delegates have understood what competencies are about and how to use them, you must introduce the organisational system. We would suggest that, even if one already exists, you start by generating a list from scratch. This is best done in syndicates and, following on from the earlier exercise, is best posed as, 'What makes a great (name of organisation) employee?'.

If a system does not exist, you can pull together these lists in a plenary session and generate a competency framework.

If a framework already exists, show it on an overhead projector and then demonstrate that all the suggestions generated fit into the one already agreed. Recently we had a total of about fifty different attributes, all of which fitted into the nine that the company had already agreed. There is plenty of research on competency frameworks, but expect to see the following main areas as a core to most frameworks:

- customer care/focus
- strategic vision
- business awareness
- implementation/effectiveness
- communication
- teamworking
- innovation.

We have, over the years, collected numerous competency frameworks and they all use different word models for the same fundamental ideas.

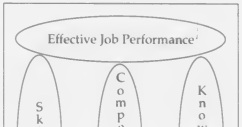


Figure 6. Alternative model for competencies

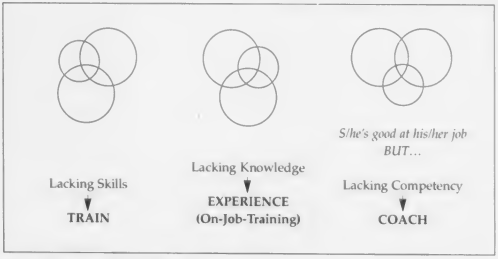


Figure 5. Development solutions

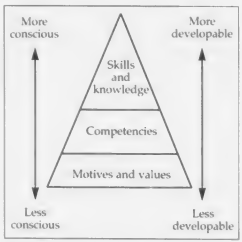
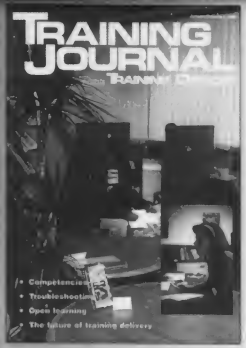


Figure 7. Competencies and the skills and knowledge required for the job



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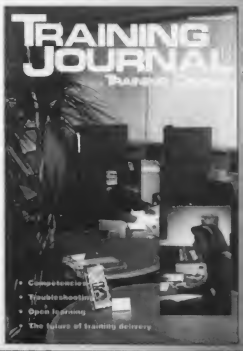

Using competencies

By this stage your delegates should be clear both about competencies in general and their organisation's competencies in specific.

Your next task is to get them thinking about how to use competencies; the main uses being recruitment, selection, promotion and performance management, and appraisal. Figure 9 shows some of the relationships.

The skill set for interviewing using competencies is the same for interviewing without competencies. Figure 1 sets out whether or not you need to train in the skill set. If you do, this will involve open questions, active listening and the effective use and observation of non-verbal communication.

Because competencies are less obvious, more subjective and more personal than knowledge and skills, there is a possibility, especially in performance reviews, that people may become defensive. It is therefore vital that appraisers have lots of examples to discuss with appraisees in these situations. They should also be reminded of the cardinal rule of appraisal, 'No surprises' — that is, you should raise issues when they arise not just at review time. Some useful questions to elicit responses for competency based issues are along the following lines.

- How do you think you came across when you ...?
- How do you think they perceived your actions?
- What impression do you think they received?
- How did you go about ...?
- Why did you ...?

This can also be used in promotion situations or where career planning is taking place. The question will be along the lines of 'What skills, what knowledge and what competencies do you think you will need to exhibit in order to be considered for the position you want?'. This can help identity skills gaps and lead to effective personal development planning.

In a recruitment interview, the questioning will be more centred on behavioural events, trying to ascertain what competencies the candidate has exhibited in real life situations. The questioning starts with, 'Tell me about a situation when you had to...?,' and will then follow up with, 'How exactly did you go about that?,' or, 'What problems did you face and how did you overcome them?'

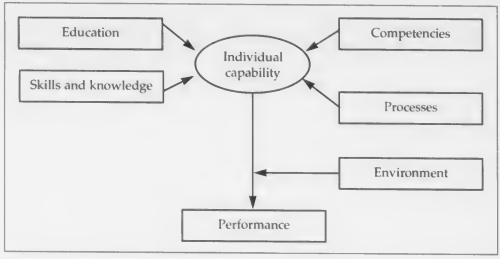

Figure 8. Factors affecting performance

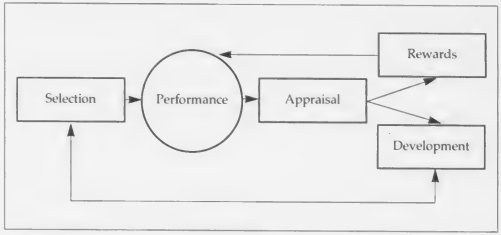

Figure 9. Performance in organisational context

We always try to use some element of role-playing, either with case studies or examples that delegates bring with them to practise the use of the skills. For longer programmes, video is very powerful.

To measure or not?

If competencies are used as part of a performance management system, they are sometimes measured as shown in Figure 10.

The same argument exists about whether to measure competency levels as whether to put ratings on performance management systems. We prefer systems without ratings as we believe that the discussion and the agreement of development needs is more important than agreeing an arbitrary number; the process can also lead to unnecessary disagreement.

If, however, your system does involve numbers, it is important that you get agreement as to the indicators that point to each level of competency required or demonstrated.

These need to be agreed beforehand and delegates need to practise using them. One effective exercise is to prepare a job description of a standard job that all will recognise, for example a store person, a

Continued on page 15

Competency	Level required					Level demonstrated				
Communication	1	2	3	4	5	1	2	3	4	5
Teamwork	1	2	3	4	5	1	2	3	4	5
Etc.										

Figure 10. Measuring competencies

Building competency maps

One way of ensuring that your competency map reflects the skills, attributes and knowledge required by your people and at the same time has a direct link with the organisation's strategic direction, is to opt for a tailor-made solution. In this article **Christine Bish** offers advice on how to design your own competency map, incorporating tips about gathering data and its management, through to the importance of supporting profiles and updating your competency map.

Christine Bish is a Director of Resource Strategic Change Facilitators and has helped a variety of organisations to implement 360° competency profiling. Christine has been instrumental in developing the ADaPT® suite of software. Christine is also the co-author, with fellow director Tony Mann, of an activity pack titled 'Tailoring Competencies to Meet the Needs of Your Organisation' published by Kogan Page.

More and more organisations are applying the competency approach to a variety of human resource activities. That is not all, they are also turning to competencies that 'fit' their organisation — ones which they have researched and developed to reflect those skills, attributes and knowledge that are required by their people. And there is more, they are recognising that those competencies need to have a direct link with the strategic direction of their organisations. Gone are the days of buying the 'off the shelf' solution — successful companies are 'doing their thing' and designing, or commissioning the design of, the competency map that is right for them.

Clearly, this 'made to measure' approach is going to take time. The end result, however, will bring rewards which would have little chance of being achieved in other ways.

Getting started

So where to start. As in many other initiatives in which we have all been involved, commitment is key; commitment at the highest level in the organisation and preferably involvement too; willingness to have input into the competency research and to be the subject of competency profiling. Much of this commitment can be engendered through involvement of representatives from all levels of staff, across the different functions and from different sites. If the work is being undertaken totally internally, then it will most likely involve a team of 'interviewers' to gather the raw data that will ultimately become the competency map. In short, the more people who can have close contact with the process in one form or another, then the greater the acceptance of the resulting profiling activities and their outcomes.

Design of your own competency map will generate large amounts of data. Data management can become a core task and it is important to have identified, before you start, how you will manage that data. This applies just as much, if not more so, to the management of the data produced when profiling your people as it does to the collection of information from which to build the competency map. Many a questionnaire has been designed by an enthusiastic researcher without thought to the management of the data it will generate or the format of the results which could potentially be produced. Figure 1 shows the results of analysing data collected using repertory grid interviews during our work on leadership competencies with Peugeot Motor Company. It is important to identify the core competencies and then to define the importance and the level of potential required in different roles.

Competency frameworks

There are many competency map frameworks to refer to. One, or a combination, of those already in existence might offer the right framework for you.

- Competencies and evidence statements written at different levels of competence. See Figure 1, which gives 'Sets priorities' as an example.

- Competencies and evidence statements with a common scoring regime. See Figure 2, which gives 'Consults with staff' as an example.

In short, the more people who can have close contact with the process in one form or another, then the greater the acceptance of the resulting profiling activities and their outcomes

It is also possible that competencies which would relate to your organisation are already in existence. A word of warning though, do ensure that the language used *does* fit your organisation and that the range of competencies reflects the required capabilities of your strategic goals.

Approach to collecting data

Involvement of a wide range of people from within the organisation is a very positive way of getting people's acceptance of the initiative. Volunteers could be sought; people could be randomly selected; whatever means you use, try to ensure that functional and hierarchical representation is fair. Methods of collecting information from those people selected offer a wide choice, including:

- one-to-one repertory grid interview
- focus groups activities
- critical incident interviews
- time diaries
- business analysis
- cascading the strategic focus.

One or more may be used in order to gather as wide a range of data as possible. Further valuable information could be sought from customers and suppliers, giving a different perspective on the organisation's operations.

Depending on the size of your organisation, you may decide to have a team of people collecting data. These people would need to have the necessary expertise to undertake this work and would possibly need additional training to do so. Look upon this input as a practical opportunity to develop your own people in new skills which could well be used to advantage in other situations.

Skills, attributes and knowledge

When collecting your data, remember to focus on the three aspects of competencies — skills, attributes and knowledge. Many organisations are coming to realise — often too late — that the knowledge which people have built up over the years is vital to the success of the organisation. People have been accepted for voluntary redundancy without the necessary value being given to the knowledge that they take with them. It is not until they have left the organisation that their knowledge becomes valued. Knowledge retention is therefore becoming a critical activity in successful organisations. In addition, there is a lot of evidence that the attributes which people have are as important, if not more so, than the skills they have. A recent report on what employers were looking for in school leavers and graduates named: enthusiasm; willingness to learn; loyalty; friendliness and commitment, as some of the core competencies. Academic qualifications came a long way down their list. Daniel Goleman[1] reports time and time again on what has come to be called 'emotional intelligence', that is the core attributes needed by individuals to enable them to function effectively in their work.

Data management can become a core task and it is important to have identified, before you start, how you will manage that data.

Applying the competencies

Once your competency map is developed you are ready to use it at the heart of human resource development — recruitment and selection, appraisal, training needs analysis, career development, selection (or retention) in redundancy situations, succession planning, reward systems and so on. Taking just a couple of these: it is much more effective to base training needs on a comprehensive competency review than to simply offer courses on an à la carte basis; selection interviewing becomes much more focused when the selection process is designed around an analysis of the competencies needed by the future jobholder. I have been involved (as a school governor) in identifying the competencies needed by a new nursery teacher and for helping to design and conduct the assessment process. We have been very happy with the person chosen.

Sets priorities	Level
Knows what needs to be done and by when	1
Identifies key actions which have most impact	2
Prioritises to meet deadlines	3
Assesses and changes priorities at short notice	4
Ensures other know what is needed and by when	5

Figure 1. Example to show competencies and evidence statements written at different levels of competence

Consults with staff
Involves others when decisions affect them
Gets ideas and input from others whenever appropriate
Works things through with people
Takes other people's views on board.

Figure 2. Example to show competencies and evidence statements with a common scoring regime

Carrying out competency profiling — managing the data

The degree to which you seek self-appraisal and collate the opinions of others about each person being profiled, will depend on the data management systems you have at your disposal. The 360° approach is becoming very popular in a wide range of organisations. It can be done at a basic level using simple pen and paper forms. Some organisations use spreadsheets to manipulate the data. We use a software system specially designed for the purpose, ADaPT@ability.

Support processes

Just as it is important to plan at the outset how you will manage the data, it is vital that you also plan who will support the profiles throughout the profiling stage.

People who are the subject of a profiling exercise will need to be introduced to the concept before the profiles are undertaken. Those who are being asked to respond to the competence of those people may also need an introduction to the concept. The need for this will diminish once more and more people are involved in the initiative, as those who are initially being invited to respond will become profiles at a later stage and vice versa.

Once the individual profiles have been produced, it is key that the organisation has something to offer those who have been profiled. It is far from a positive experience to be presented with a profile that highlights your shortcomings if the organisation can make no suggestions or offers no resources to help that person to develop those areas of weakness. Nor is it helpful to highlight strengths if opportunities to use those strengths are non-existent.

Throughout the whole of the profiling process, build in the opportunity to talk. People will have varying concerns to varying degrees. Some will take this process on board without a concern, others will get very anxious about it. A human presence which supports the mechanical process will ensure that concerns and worries are identified and dealt with in their infancy and before they become major issues.

The profiling process with which we are involved with Peugeot Motor Company has been supported by one-to-one feedback sessions and group feedback sessions. These have been carried out by a member of the Peugeot Leadership Development consultancy team. Sue Bradshaw, Dealership Development Manager has said of the process.

"The profiles produce sophisticated, easily understood information, but it is just as important to build in the opportunity for the profilees to talk through their results, both one-to-one and in their management teams. This makes it an open, positive and, most importantly, successful process."

The initial phase of profiling should be scaled to manageable proportions. What is manageable will depend on the methods of data management you have in place and the level of human support that can be given.

When collecting your data, remember to focus on the three aspects of competencies — skills, attributes and knowledge

Updating your competency map

You will have developed your competencies with care. They will have been related to the needs of the organisation and will have been checked across departments and levels of staff. You will have arrived at a superb competency map with which everyone can identify and feel comfortable. You can be happy in the knowledge that these competencies will stand your organisation in good stead for the future.

But things can change and the future may take a different turn. The organisation may need to review its strategic objectives and possibly even restructure. These actions may have an effect on the definitive competency map that you have carefully and conscientiously nurtured. There will be a need to review and possibly revise your work.

Finally, organisational goals can change; individual aspirations may also change, in line with the organisation's vision. When organisational goals and individual aspirations get out of sync then uncomfortable situations can ensue, which may well result in an individual moving out of the organisation.

To take this a step further, some organisations are now finding that the external influences on their businesses are causing a shift in values. For example, the driving force for the health service may be seen as one of meeting budgets. Many people who joined in the past, to care for others, are now disillusioned and have left or are looking to leave in order to find something that fultils their values.

Your competency map may need to reflect, in behavioural terms, the values which exist in the organisation. In this way you will be able to identify those people who espouse those values and those who do not. The latter may need help to discover that they no longer feel part of an organisation, which they felt for a long time was 'home'. They may need support to leave the organisation in a dignified and constructive way.

Points to remember

Identifying competencies for success

- Ensure that competencies reflect strategic objectives of the organisation.
- Tailor competencies for *your* organisation.
- Plan at the outset what will happen at the end.
- Scale the scope of your profiling exercise to manageable proportions.
- Build in the opportunity to talk.
- Use competencies to retain knowledge.
- Include the emotional intelligence aptitudes.
- Competencies change — review and revise.
- Organisational goals and individual aspirations must align.
- Make the competencies transparent so that you get line management to 'buy-in'.

Conclusion

To ensure that your competency framework repays the investment in it, you should aim to make it central to the different Human Resource activities. In this way managers will see its relevance and will find that their actions are much more cost effective and result in better decision making. ■

Reference

1 Daniel Goleman, *Working with Emotional Intelligence*, Bloomsbury.
2 Daniel Goleman, *Emotional Intelligence*, Bantam Books, 1995.

Troubleshooting

Trainers often find themselves in the middle of a clash that has nothing to do with them whilst training, which requires that they troubleshoot. In this article **Mary Stacey** and **Lucy Seifert** look at some examples of trainers troubleshooting from the 'piggy' position, at why they found themselves in it and what they did.

Lucy Seifert

Mary Stacey

Lucy Seifert is the principal of Lucy Seifert Associates, a consultancy offering a range of courses. She is the author of 'Training for Assertiveness' and 'Training in Self-Empowerment' both published by Gower. Mary Stacey founded her own training consultancy in 1988. She is the author of 'Parents and Teachers Together' (Open University Press). They may be contacted on: www. for-trainers.com lucy.seifert@for-trainers.com mary.stacey@ for-trainers.com

It happens to the best of us. Fully-prepared and following the course framework, the group apparently working with you, you become aware of other agendas in the room, a sudden tension. You have inadvertently hit some resistance or highlighted a difficulty.

We call it the 'piggy-in-the-middle' syndrome. You are in the middle of a clash that has nothing to do with you. Or you realise that all is not what it seems. You find you lack some essential inside information or have heard only one side of a story beforehand. You are not precisely sure what is going on. As an independent trainer, this may be the moment when you learn the true nature of the group dynamic or the organisational politics. As an in-house trainer you find yourself caught in the crossfire of individual differences or internal wranglings. New trainers can come away from the training feeling a failure for not dealing with the difficulty adequately or foolish for not realising what was going on until that moment. Experienced ones may feel downright anger for being set up.

The 'piggy' position is, of course, extremely useful for moving groups forward or resolving new or sensitive issues. A trainer's objectivity is her or his strength. The unexpected is the stuff of training, the catalyst for learning or creativity. But while it may be challenging and stimulating, there are times when it is uncomfortable for you and the participants, sapping your confidence and making you wonder what you are doing together.

In our discussions with other trainers for our book*, we found that although they came from different training environments and had different training styles they had all had to 'troubleshoot' periodically. Sometimes you learn a hard lesson for the next time; sometimes you make the best of the situation and at other times you use the position to great advantage. But an integral part of training is thinking on your feet, challenging, making decisions, problem-solving alone or with participants.

The 'piggy' syndrome occurs most commonly when the trainer's position or task has not been fully claritied, when feelings surface which have not been explored openly until the training session and when staff are disgruntled or feel powerless. Discussions at the beginning of the course about the nature of the training and its objectives will go a long way in highlighting the role and responsibility of everyone involved, if learning is to take place.

Working with the manager

The most experienced managers can, even subconsciously, perceive training as an implicit criticism; you have been brought in to solve the problems. They may feel threatened in front of you, or if they are in the group, exposed in front of their staff. Managers who are happy to 'relinquish' their role during the training are usually confident for their staff to talk openly. But even then, you need to support them in this because staff, invited to be 'honest', can subject managers publicly to unexpected views or surprisingly critical comments.

A trainer describes how discussing the manager's role before the training helped when the unexpected happened. At the beginning of the day, the group had agreed the ground-rules for working together and discussed their need to move forward. Everything seemed to go well until they had to make a decision about new practice. The manager was open to new ideas. But suddenly the group went back to their old ways and renounced all responsibility. "It's up to the management", they agreed.

'Management', well-liked and respected and actually sitting in the room, was visibly shocked. Without patronising the manager, siding with her, or taking over her role, the trainer challenged the group:

"I needed to make the group think about where their responsibilities lay, what management means and what they can 'manage' themselves."

It's important to discuss the nature of the 'leadership' in the training with the manager so that neither of you collude nor get put in an awkward position. In this case, the trainer was clear it was her job to look at 'management' as an issue not expect the manager to defend herself.

Critical comments can come thick and fast when the manager is not present and it is easy to get drawn into the prevailing view if you are not careful. A trainer tells of her surprise when she met the 'monster in manager's clothing' after sympathising with his staff's description. He was 'an intelligent, thoughtful individual, who no doubt set high standards but also had his staff's interests at heart', she realised. She could see that there was likely to be friction, but also learnt how easy it is to be drawn in and make judgments having heard only one side of the story.

The trainer's job is to listen empathetically to complaints and allow participants to release some of their feelings, but this isn't an end in itself. It is more important to concentrate on helping people find their own solutions for dealing with the difficulty. You need to be aware of the organisation's culture. In a very tight hierarchy, people may be afraid to voice their complaints or not know the appropriate way to do this; or an informal team may not like to voice their disagreements in case it seems disloyal or conversely, see training as a place where there are no holes barred.

Using practical exercises and activities that give people a chance to give their opinion and ideas in safety may bring consensus or give the opportunity to talk about disagreements in an impartial way. You're unlikely to change immediately the culture of the organisation, but you can start people thinking differently. Allow people some time to moan but focus it so that you can channel the ideas into practical strategies rather than going down the path of no change. Constant resistance can take away your confidence or enthusiasm. Your role and what you can realistically offer has to be clear. You may be a sounding board, you can probably offer suggestions, but in the end it is the manager, together with the staff, who will have to instigate and see the changes through.

We call it the 'piggy-in-the-middle' syndrome. You are in the middle of a clash that has nothing to do with you. Or you realise that all is not what it seems.

Turning the tide

Some groups, feeling powerless to express their anger directly, take it out on you. There are the cynical or disillusioned, who suspect you are there just to put more pressure on them. And cries of "we've tried that, it doesn't work" or "there's nothing we can do" can easily take away your energy. You have to call on all your reserves, listening out for the sign of positive thinking in the group in order to avoid them going down the slimy slope of self-pity or resentment. They'll be truly thankful to you for pulling them up out of it, to hear a still, calm voice giving some realistic and practical suggestions. Your aim is to give people something that is possible to put into practice, so they can make some change. You may not win them all, but better to have given some practical ideas to a few than get drawn down into the protesting culture.

You may use your 'piggy' position to become the broker or catalyst, so people begin to communicate more effectively with each other. A trainer, running a customer care course, was getting no response from the group and finally asked what was wrong. The floodgates opened. The group poured out their feelings about how they were managed and that a customer care course was the last thing needed. Quickly assessing the situation, the trainer realised that the group could not offer good customer care if they didn't care about themselves. Having faith in his role as trainer and the group's capacity to move on, he decided to take a risk:

"I decided there and then to ditch the course and offered to help them in their relationship with their boss."

Using his 'piggy in the middle' position, he worked with the group on thinking out and setting goals for how they would like to be managed. He coached them in how to give their views coherently. They discussed what they would have to do to feel more empowered and have a more adult relationship with the boss. The group role-played the meeting and practised skills for negotiating.

His risk paid off and the meeting was successful, the manager pleased to see a motivated staff with ideas of their own. The trainer learnt from this experience:

"not to take what the manager told me before the course at face value but to probe more deeply. I also learned not to be afraid to respond to the needs of the participants if that meant shifting the original brief."

Seeing the two sides to the story and recognising his strength as 'the piggy in the middle' he acted as the conduit between the two sides without taking away the responsibility from either.

Trainer on trial

Being clear about your boundaries in the training room and role as trainer stops some of the 'piggy' situations. Some participants come with a reputation in the organisation. Being clear about the nature of the confidentiality in training avoids you getting into the position of judge or jury. A trainer emphasised the importance of her integrity when asked to take a participant whom managers were finding difficult. "So what can you do? We've got to the end with him," they told her. She suspected they were sending him on training partly to get him out of the office for a time because he wasn't up to the job, but also that they would have difficulty dismissing him.

She set ground-rules with the manager, agreeing to feedback relevant issues, but only with the participant's permission. She was open with him, too, about information the manager had asked for. The group recognised he was resentful about being sent on the course and she acknowledged this with him in front of them. But so he was not singled out, she agreed the same ground-rules with the group. She focused his attention on practical strategies he could take back to his workplace.

Building trust is a key ingredient for successfully working with anyone involved in the training, whether in the room or outside. So finding yourself cast as an enemy and in the middle of a dispute which carries into the training room is extremely uncomfortable. Two co-trainers described their amazement when an unresponsive group complained to the training department about their attitude as trainers. They had found the group's response lukewarm and had worked hard to make the day interesting and lively. They could think of no way in which they had put them down or been disrespectful. They were therefore horrified to discover afterwards that the manager had led the participants to believe that the trainers were assessing them. As this had happened before, the participants wanted to get in first with their complaints. The trainers were upset that they had never got to the bottom of this; the culture of mistrust was such that it had permeated what they were doing; the participants had immediately cast them as adversaries to outmanoeuvre.

The quick fix

Trainers complain about being asked to telescope material into shorter training sessions. A trainer asked to do stress management in half a day felt caught:

"between their objectives and budget on the one hand and what I deem to be in the best interest of participants and organisation on the other."

Is a quick fix better than no training at all? It can be a difficult decision. You want to offer good quality training. As an independent trainer, this may be your first introduction to an organisation you'd like to work for. How do you gain back control and feel less of a piggy?

The 'piggy' syndrome occurs most commonly when the trainer's position or task has not been fully clarified, when feelings surface which have not been explored openly until the training session and when staff are disgruntled or feel powerless.

The main object is to clarify precisely what you can and cannot do. Negotiate the content of a shortened course, pointing out the advantages of focusing on one or two areas, rather than skimming the surface of many. Without downgrading your training, it's important to explain to the client and participants the benefits and the limitations of the training, so no-one feels short-changed. We believe that people learn most effectively when they have time for reflection and deducing things for themselves; so, if possible, you need to give an opportunity for this somewhere in the programme. A short course on stress, for example, can leave people feeling worse off, unless it is clearly focused. You need to give examples, explaining that you are introducing techniques which people may want to follow up. Even better, try to negotiate a longer course. If the shortened version is stimulating and useful, chances are that the participants will see it as a taster and ask for more.

Your role as trainer

Maintaining your authority as trainer is important and discussing the role beforehand is vital. So the closer the understanding between you and the person requesting the training — or indeed, co-training — the less likely you are to fall into the 'piggy' role. An effective trainer has clear responsibilities. It is crucial that you know what these are, as well as those you are working with. You may have prepared well, been candid and ethical with the participants, but still find yourself as piggy. If this happens, just remember the following points.

- This is a common experience in training; make the most of it
- Forearmed is forewarned.
- There are times when you can go no further in the training. You can only go as far as the participants are prepared to go.
- Others, like you, feel foolish or downright angry when they feel they have been set up.
- You may have to put your experience behind you, but you are likely to have learnt something useful, too.
- The 'piggy-in the-middle' is a powerful position. It opens up new thinking, strategies and solutions for you and others. ■

*Lucy Seifert and Mary Stacey are the co-authors of *Troubleshooting for Trainers: getting it right when things go wrong*, published by Gower Publishing Ltd. October 1998. They also run courses, based on the book.

Continued from page 9

clerical officer, or a nurse and then to get delegates to agree levels against the competencies. The next exercise requires them to set out the required levels for one job they are responsible for (their own or a subordinate's) and then to decide upon the level demonstrated and, most importantly, a development plan to agree shortfalls.

Do remember to include examples where the individual exhibits a higher competency level than is required for the job. There are two reasons for this; one is to demonstrate that competencies are not another stick with which to beat staff; the other is to show that such a situation might imply the person has wasted talents and is in the wrong role. For example, someone with high customer care competencies working in a solitary role will have wasted talent and may well be dissatisfied. Both the organisation and the individual will benefit from a job change.

Conclusion

Competencies are a very powerful management tool, especially when linked into an organisation's selection and performance management systems. They are less black and white and therefore more difficult to use consistently across an organisation. Effective training is therefore vital.

I have tried to show how we go about training competencies and the models and methods we have used work well. ■

Mark Briegal has worked with a number of organisations over the past few years helping them to introduce new competency based HR systems, or to add competencies to existing systems, especially performance management/appraisal systems. During that time they developed methods that work well and which use some of the processes set out in this article. This builds on research into competency frameworks carried out by Mark as part of his MBA programme at the Manchester Business School.

Running a successful learning centre

Drawing on her experience in managing a learning centre, **Karen Velasco** offers tips and guidelines on how to run one successfully.

Although not a new concept in the AA, the opening of the Simon Dyer Learning Centre in Basingstoke in April 1997 raised the profile of learning centres within the organisation. Previously, learning centres had been set up at regional offices, but they tended to be business or function based, and carried only a restricted amount of materials; these tended to be books or videos, and for the most part were particular to the business or function's needs.

The late Simon Dyer was director general of the AA from August 1987 to February 1996. The centre is named after him in recognition of his commitment to education and is a tribute to his belief that commerce and industry have a responsibility to provide opportunities for individuals and to help them fulfil their potential. The centre is the first one to be made available on a group-wide basis, and is the first to exploit technology based training to any real extent. It has a full-time permanent administrator, a manager, and is governed by a steering committee made up of representatives from the company's main business areas.

Because of its adoption of the Simon Dyer name the centre was, from the very start, a high profile project. It had to succeed — it had been given a prestigious location in one of the company's main buildings in Basingstoke and it had a very high-profile launch, with members of the committee and all executives in attendance. Both the centre's location and its awareness amongst senior management have been key factors in its current success.

It is pleasing to report that the average usage is now well above 60 per cent, with figures of over 80 per cent occupancy being recorded in the latter part of 1998.

Karen Velasco joined the AA in 1990 with the task of setting up an internal IT training department, following similar IT training roles within local government and a health authority as both manager and deliverer of training. In addition she has responsibility for the management of the Simon Dyer Learning Centre, and is currently working on expanding this into a network of learning centres across the organisation. Karen is a Member of the Institute of Personnel and Development and a Fellow of the Institute of IT Training. She is also a member of the Forum for Technology in Training. Karen may be contacted on 01256 491738; e-mail karen.velasco@theAA.com.

Marketing the centre

However, much hard work and preparation have also been put into the marketing and promotion of the centre, and from the beginning a marketing plan was put in place. The initial marketing plan for the centre covered its first year of life, with short and long-term promotional activities planned, and the following objectives being set:

- to raise awareness through a variety of promotional activities
- to achieve 60 per cent usage of multimedia PCs
- to maximise use of other resources
- to generate a co-ordinated approach to open learning.

One of the early decisions made was that it would be important to market the benefits of using the centre, and not just the features. Examples of features would be the type of packages stocked, media available, facilities, and so on, whilst it was felt that marketing the benefits would bring more longterm interest and use. Benefits included:

- convenience and accessibility
- development of new skills
- acquisition of qualifications
- more productive use of free time
- links with corporate-wide objectives (for example, IiP)
- moving from a training to a learning culture
- individual responsibility for learning.

Initially, marketing activities concentrated on encouraging staff to visit the learning centre for the first time. Despite its prime location in the main reception area the 'newness' of the method of learning seemed unusual and perhaps a bit daunting, particularly for those people not used to using technology. The following events have all been successful in increasing the numbers of people using the centre:

- open days/evenings — targeted and general
- articles on team briefing

- exhibitions and roadshows
- sponsored seminars
- networking, especially with internal departments
- word of mouth
- trainer days — designed to promote the centre to the organisation's trainers
- inclusion of a visit to the centre on induction events.

Communication methods

Networking — particularly with staff who organise internal communications is always important. A variety of communication methods have been used, some of which have met with more success than others.

Posters, although expensive to produce, have on the whole been reasonably successful if carefully positioned to gain maximum readership.

Leaflets and fliers supplied by a deskdrop method are an excellent way of getting the much needed impact, especially if the flier is bold and attention grabbing.

The staff newspaper has proved to be most successful when used to report a review of an event, such as a targeted open day or VIP visit to the centre.

The learning centre also has a regular monthly section in *Intercom* — the staff notices publication. This has proved to be one of the most valuable channels used to communicate new courses, titles and events.

A quarterly newsletter is distributed to all staff on the centre's mailing list. This is used mainly to promote successes and to publicise forthcoming events.

Finally, another valuable communication medium has been e-mail. The centre does not send out promotional e-mails but makes use of Public Folders within Microsoft Exchange to provide resource lists and overviews of packages.

Promotional items

Promotional freebies have some part to play in the overall success and continued use of the learning centre, but it is not an area that we have particularly exploited.

One thing we have consciously avoided is the use of 'gimmick' give-aways. Promotional items can be expensive and can have very little value to the recipient. Always select items that can be useful, and make sure that you don't invest in anything that goes against your organisation's local guidelines. For example, if your company has a policy which states that nothing should be stuck to PC screens, then investing in two thousand furry computer bugs that promote the centre will not go down too well.

Finally, remember that image is everything, and promotional items should fit into the marketing strategy and be consistent with the centre's overall look and feel. They should also serve to enhance the organisation's brand in the wider marketplace.

Open learning library

Media and resources

The media and resources used in *any* learning centre will vary depending on the organisation's needs. To be effective, a learning centre needs to select and maintain a range of material to meet the changing needs of the organisation and the centre's users. The materials in it are the essence of the centre, and their relevance and effectiveness will have a major impact on its success.

The Simon Dyer learning centre is made up of mainstream multimedia products and AA multimedia produced in-house. It includes a range of CBT and audio/video material, as well as daily papers and a wide selection of trade magazines and journals. Local college prospectuses are stocked, and the centre has a direct video-conferencing link with the local college of technology, which is frequently used for language tutorials. The centre also has an extensive business library.

A number of training suppliers offer a revolving library facility, which is a cost-effective way of providing flexible multimedia training. This facility provides access to a wide range of titles on a quarterly basis, with the option of exchanging titles every quarter. Whilst a good idea for a centre in its early days, approach revolving library contracts with care, as in the long term it may prove cheaper to buy material outright, and library stock may prove to be quite limited after a while.

Resource centres are independent companies that hold a supply of the latest resources on the market. They can provide consultation on training needs, advice on resources available, preview facilities and 'try before you buy' options as well as a purchasing service, and they provide added flexibility and variety.

Resources for the Simon Dyer learning centre are identified via business needs, individual requests, or purchased directly by the centre itself. Before purchasing anything, the following questions should be considered.

- Is anything similar available?
- Can it be hired, and at what cost?
- Does it meet business/individual needs?
- What is the likely usage?
- Is it compatible with centre equipment?
- Can it be integrated with existing programmes?

Where applicable, the resource should be previewed and evaluated by HR representatives, individual users and centre staff. It is essential that resources, particularly multimedia products are fully tested on the PC equipment in the centre. Many products claim to work in particular environments and in conjunction with other products, but always check these claims before committing to purchase. And look for ways of integrating products with existing training programmes. It is very rare to find that 100 per cent solution in one product.

Developing the centre

A successful learning centre must always develop and change its services to meet the needs of its customers. All users of mainstream resources within the centre are questioned on completion of the programme. This is carried out via a 'reactionnaire', which covers such areas as reason for visit, the ease of use of the par-

ticular package, what they thought of the method of learning, and what skills are expected to be transferred back to the workplace. The responses are measured on a quarterly basis, and the results are published in the centre's newsletter.

Each business within the AA has its own process for measuring the effectiveness of training, and both the user and the line manager have responsibility for ensuring this takes place, regardless of the delivery mechanism.

Simon Dyer Learning Centre

Administration

The ultimate success of any learning centre will depend on how it is managed on a day-to-day basis. Effective and efficient administrative systems need to be put in place to manage resources, accommodation and use.

The use of technology within the centre, in particular the maintenance of hardware and software is essential, as is cataloguing, storing and displaying material, particularly books. Systems must be in place to manage and track both the use, and the whereabouts, of resources.

Learner support is another key administrative role. It is not just a case of 'enrolling' people on to programmes, but providing assistance and guidance on the use of resources, and on content. Although the administrators cannot be expert on all programmes, it is essential that they have an overview of the aims and objectives of them, and are able to answer general enquiries.

Technical support to the users of the centre is vital. Although most packages require few IT skills, the technology can be threatening and distract from learning if the user is not confident with it.

Successful learning centres require permanent expert staff, who are fully committed to managing the day-to-day issues and are able to be involved in developing the long-term future of the centre. The success of any learning centre depends very much on the calibre, commitment, dedication and professionalism of the co-ordinator. This person must have excellent customer relations, administration and IT skills, and should have an overall awareness or special interest in education technology, marketing and learning/training and development in general. This is not an administrative or clerical role. It is a professional and technical role and the job specification must reflect the responsibilities that go with it.

Reviewing performance

So, you have set up your learning centre, marketed it and promoted it well, you have the right resources, and an efficient and dedicated administrator carries out effective evaluation both at an individual and departmental level. You know that it is a success. But is that enough? You will also need to constantly review the centre's performance against its own objectives, and develop your own key performance indicators or measures of success, making sure that any targets that are set are measurable, realistic, and have specific times for evaluation.

Monitor the awareness of the learning centre within your organisation. To what extent has its use filtered through businesses, through groups of people, through levels of management? If people don't use it, are they aware of its existence, and what is their perception of it?

What is the level of use of the centre? Do you measure the use of each resource, or just specific ones? What is the 'bums on seats' or occupancy ratio? Is usage high within particular groups or levels of people?

How satisfied are your customers with the service you provide? How do you know they are satisfied? What are your procedures for dealing with complaints and those less-than-happy customers?

Economic indicators such as cost-effectiveness, cost benefits and cost efficiency of both individual packages and the centre itself, need to be measured. Where possible, return on investment needs to be proved.

What overall impact does the learning centre have on the organisation? How does it enhance its image and brand within the overall marketplace?

Where relevant, have independent assessments carried out on the centre as a whole or a specific part of it.

Assess your learning centre against established quality criteria provided by organisations like BAOL — the British Association of Open Learning. And benchmark your learning centre against best practice and best performing centres.

Conclusion

If I could leave you with my personal recommendations for ensuring the success of a learning centre it would be these.

Find a high profile cause for your learning centre. This can be difficult, but if you can link it in with a key figure or initiative within your organisation it will ensure that it retains its momentum and does not become a white elephant.

Convince senior management of its benefit and get them to use it. Their support of the centre goes a long way to ensuring that all staff see it as an accepted method of learning.

Position the learning centre within the organisation culture. Market it carefully within organisation guidelines, and always gain approval for any marketing campaign, no matter how low key it may seem.

Have a vision, mission, values and objectives for your learning centre. Make sure you know where it is headed within the organisation, and look to the future and plan for it. Communicate your vision for the learning centre enthusiastically, and you will be surprised at how much support you receive.

Network internally and externally — through forums or local user groups. Share information about your learning centre with other companies and they will respond in kind. Always be willing to show visitors to your organisation round the centre, no matter how disrupting this can be to the learners in it.

Use external contacts to benchmark and quality check your learning centre against the marketplace. Formal organisations exist that will offer this service at a price, but use your own contacts and set up informal benchmarking groups.

And finally, if I was asked what was the one key factor in making sure that any learning centre was a success, there would be no doubt in my mind that the appointment of an effective and efficient centre administrator/co-ordinator is the most crucial element in ensuring its continued success. ■

The future of training delivery

How do you select the right training methods for your purposes? Which is the best one? How important is it that trainers use a mix of methods? What is the role of Information and Communications Technologies in delivering training? **Brian Tucker** expresses his opinion.

There is much discussion about which method of training delivery is best. We hear people who are 'wedded' to a particular type of training delivery talking about the disadvantages of other methods. Government talks about the need for the University for Industry (UfI) to utilise the Information and Communications Technologies (ICT) to deliver training. There are traditional classroom trainers who cannot see how technology could replace their face-to-face delivery. Some of these views I will address later in this article.

Brian Tucker is Company Secretary and Co-ordinator for The Forum for Technology in Training, and a technology based training consultant. Prior to early retirement, Brian was TBT Manager for Royal Insurance (UK) Ltd. Brian has written the 'Handbook of Technology-based Training' published by Gower Publishing. He may be contacted on 0151 342 8606.

We know that:

- each of the different training delivery methods is a tool in the trainer's toolbox
- no one training delivery method on its own will suit all individuals' learning styles or preferences
- a mix of training delivery methods is likely to achieve greater learning
- whatever the training delivery method, support for the learner from both peers and tutors is paramount.

For every training need it is necessary to consider which training method is most appropriate. There are a number of factors that need to be considered. These are some of the questions that need to be considered.

- Is the workforce widely distributed?
- Can staff be released for training?
- Are there large numbers to be trained?
- Is the training one-off?
- Is role-play necessary?
- Is working in teams an essential part of the learning?
- What is the budget for the training?
- Is there a tradition of using one particular method?

If the workforce is large and widely distributed then the use of any form of distance learning will prove to be cost-effective. This is because there will be reduced costs associated with traditional centralised classroom training. It is undoubtedly much easier to prove the cost effectiveness of distance learning in large multinational organisations. This is why multinational companies and large national organisations, such as financial sector organisations, were the first to take up distance learning in all its forms. However, there are benefits to be had for the small- to medium-sized organisations as well.

It is true that, initially, training methods like computer-based training (CBT), interactive video (IV) and later multimedia necessitated a large outlay on equipment. It was, therefore, only taken up where the cost of the hardware could be offset against the large savings made. However, with the price of computers falling considerably, even the small companies are using personal computers (PCs). The PCs in small- to medium-sized enterprises are often more modern, and therefore more up-to-date, than those in the larger organisations.

One of the factors that affects the choice of delivery method is whether or not staff can be released for training. Nearly all organisations, irrespective of size, are having to work with fewer staff in order to be competitive. This makes releasing staff for even a day's training very difficult. Whereas the work of someone away from the workplace used to be absorbed by the rest of the workforce, this is no longer possible. If an additional person has to be employed on a temporary basis that increases the cost. If not, then there are often lost opportunities. One leading financial institution has calculated that for every lost day in the sales team the cost to the institution of revenue opportunities is £850.

Unlike many of our European neighbours we do not have a culture of learning at home. This could change as individuals begin to take responsibility for their own learning and realise the benefit of keeping up to date in order to be redeployed or find work elsewhere.

If the training is to be a 'one-off' then it is probably not cost effective to go down the route of open learning, depending on the size of the target audience. One of the

features of open learning is that, once it has been produced, the more it is used the lower the cost per unit of training.

Where role-play is a necessary part of the learning process this is best done in the classroom. Obviously, if there is a definite need for working in teams to learn about teambuilding, then this is best done as facilitated group work, whether it is indoor or outdoor. Although there are very good technology-based management development programmes, where teams work together to solve business problems, these are always facilitated and do not fall into the definition of open learning.

However, we should not rule out open learning when looking at interpersonal skills training. It has its place in transferring the knowledge and ensuring that everyone who attends a workshop to carry out syndicate exercises/role-play etc, is starting from the same base of knowledge. Usually the trainer spends half of the time teaching the skills and ensuring that everyone is on a level playing field.

One financial institution involved in running supervisory training courses found that participants had either been in the job for some time or had no experience at all. The organisation introduced a multimedia supervisory skills course that taught the essential skills, which was a prerequisite to attending the course. It was found that although the course still took a week to complete, the whole of that time was devoted to practical work and the performance of the supervisors was markedly higher than those who had previously attended the course only.

Whether we like it or not, the constraints of the budget have a significant influence on the choice of delivery method. This is regrettable as it does mean that we do not always end up with the best solution to the problem.

It is necessary to consider whether there is a tradition of using one particular training delivery method. A change may affect the learner and impede the transfer of knowledge. We all have learning preferences as well as different learning styles. However, we should not get too hung up on these or we will find ourselves in a rut. Neither must we let our preference of learning method influence our decision.

We cannot choose one method of delivery and then expect to use this as the only method for all the organisation's training needs. That will not work.

It may come as a surprise to find that someone so heavily involved in The Forum for Technology in Training, is not suggesting that technology-based training is the answer to all your needs. Nor must we get swept along on the crest of a new technology wave. I am sure that I am speaking for all our members when I say that we have all persuaded clients, both internally and externally, that a technology-based training solution is not appropriate for a particular training need. Where a specific training method gets a bad name, it is often because the method of training delivery is not right for that particular piece of learning.

It is certain that no one method of training delivery can stand entirely alone. A mix of media helps in the transfer and retention of knowledge.

What we are likely to see in the future, and are beginning to see already, is the use of ICT, that is the Internet, intranet and extranet. This does not mean that all of the training/learning will use these methods, but that part of the training will do so. This will happen for a number of reasons:

- the increase in home working and remote office working
- the need to have only one copy of the learning material
- the need for employees to get the learning when they need it (just-in-time training)
- the need for the employee to get just the learning they need to solve their current problem (just-enough-training)
- to make better use of the subject expert's valuable time
- the University for Industry.

The increase in home and remote office working will create a need for greater use of ICT in learning, because, in the first place, bringing the works to one location will be expensive, but more importantly the majority of the people are working from home because it suits their circumstances; for example, single parents and disabled people. The learning may be from paper-based materials, CD-ROMs or over the Internet, but the all-important aspect of support for the learning, either from peers, tutors or subject experts, is likely to be by telephone, e-mail or video-conferencing.

Large organisations have experienced the problem of being unable to ensure that all their learning material is up to date. In a time of constant change there is a need to have the facility to up-date the central copy and know that everyone using that training is looking at the latest version. This, more than anything else, will drive the large corporates down the intranet path.

Just-in-time training is becoming a greater need. Most of the day-to-day operations in any organisation are routine. It is when individuals confront something out of the ordinary that they need to be able to get a specific piece of training at that point in time — not tomorrow, not even later that day, but right at that moment. This is only really practical, using intranets or extranets.

The other important essential is that they only want the piece of learning material that will solve that particular problem, not a lot of extraneous material.

The experts in our organisations are very important people and we should use their time effectively. Firstly, we do not want to involve them in travelling the country, giving training sessions. We want them to be in their place of work, solving the problems that only they can deal with. Secondly, if they can deal with people's learning problems remotely by e-mail, then they can use their time effectively, rather than face continual telephone interruptions.

The University for Industry is placing great emphasis on using ICT for learning. This may be CD-ROM or Internet delivery, but the assessment and support will almost certainly be by telephone or Internet. Irrespective of whether we all feel that is a good thing, it will not influence the way the UfI will work.

Summary

While I personally feel that a mix of media provides the best learning, I am fairly sure that technology will play a large part in the future of learning.

Whatever training delivery method is used, it is essential that there be support for the learner. This must be both peer support and tutor support. If the tutor is not the subject expert, then the subject expert must also be available for support. ■

From CBT to multimedia

Some years ago **Jane Elson** had identified that there were staff who needed training in medical terminology in order to allow them to act in support roles to clinical staff. On looking for a cost-effective solution, a computer based training programme was found. This proved to have shortcomings, however, and a collaborative venture between the private and public sector resulted in the production of a CD-ROM course, which is now used by twenty NHS Trusts and twelve insurance companies in the UK.

Jane Elson is head of learning resources at The Leeds Teaching Hospitals NHS Trust.

The Leeds Teaching Hospitals NHS Trust grew from a merger, in April 1998, between St James' and Seacroft Hospitals, and the United Leeds Teaching Hospital, based at the Leeds General Infirmary and also with a number of small, subsidiary units. The resulting group of hospitals is the largest teaching Trust in Europe — employing over 14,000 staff.

Some seven years ago, St James' and Seacroft Hospitals developed learning centres delivering a range of 'mix and match' training options including tutor-supported, text-based open learning and on-line, multimedia-based training to cater, primarily, for the needs of their 6,000 staff.

Since hospitals and their staffs need to care for their patients 24 hours a day, it is difficult to take people off the job in order for them to attend 'traditional' classroom-based training sessions. In addition, sudden emergencies can mean that those booked on such courses are unable to complete the courses because they are required to perform their duties instead. Despite this, the members of staff are dedicated to continuous professional development (CPD) and have various, continuing training needs and these must be met — preferably in a flexible and cost-effective way.

One of the reasons we opted for multimedia delivery of training was because of the logistical problems of getting like-minded groups of people, with the same learning start point, to undertake training at the same time. An open learning approach with support from a training facilitator, rather than an administrator, is a practical option, though not a cure-all. Open learning works well where the demands on training are high and/or spasmodic, and there are small training teams and budgetary constraints.

When delivering training, we have to consider how we can make things available to a wide range of staff — both 'professionals' and 'non-professionals'. We have to design things in 'bite-size' modules to fit in with individuals' learning curves, concentration time and the demands of the workplace. Our delivery methods have to be flexible in order to ensure that we can support the training needs of the individual, the needs of the organisation and service as well as operate in an efficient way.

We could make even more use of multimedia based training and simulations but resourcing its development from scratch can be too expensive for an individual Trust. That is why establishing working partnerships — with other users, and producers — is important.

Among the training needs which were identified at Leeds was that non-clinical staff, working with clinical teams, needed to develop a better understanding of medical terminology. These staff input key information from doctors' notes to the mainframe computer using nationally recognised codes. The resulting information is used for statistical purposes to support service and business planning, service re-configuration and so on. It has a high importance and value but, traditionally, staff who were recruited to undertake these duties did not normally

have a clinical background. Although one of their key training needs is to understand medical terms, traditional training took a considerable time and its effectiveness was not assured.

The Trust looked at the options to provide these staff with training in medical terminology. Historically, medical secretaries took courses in medical terminology at local colleges but many of these courses had ceased to run. This prompted the Trust to look at computer based training (CBT) and I found a Medical Terminology course delivered by CBT and produced by Legent (now Pathlore Software).

We tested this course with experienced staff, who thought that it was just what they needed and recommended that the course form part of the induction training programme for specific non-clinical staff. This course was modular and we liked it because it dealt with all the parts of the body, offered structured testing for users and produced user scores for our records.

However, we felt that while the structure of this course was good and the student testing elements were essential to test levels of understanding, it was all rather 'flat' and boring and, without graphics, did not 'come to life'. The lack of sound meant that learners could not hear how the medical phrases should be spoken and our staff needed to learn the phrases, the spelling and hear the pronunciation in order to help their level of understanding and recognition.

All we had to do was to convince the course's developers, that our proposed enhancements of graphics and sound would increase the impact of the training it contained and were worthwhile. So I offered to work with them to produce a multimedia version of the course. It was clear to me that converting the course to CD-ROM — with its ability to include audio — had business benefits for everyone because we, and other organisations, could capitalise on a course which, even in its old state, was an effective learning tool. In addition, the development time, effort and cost could be kept to a minimum, since we were only enhancing the quality. The core of the course could be transferred directly to CD-ROM without having to be designed from scratch. This was also essential because our training budget is relatively small and it was futile for us to 're-invent the wheel' and develop our own course when adapting this one would work just as well!

I agreed to carry out a technical content check on the programme's 20-hours of material and wrote the accompanying script, to add audio to the programme. My colleague, Dr Karen Illingworth, head of resuscitation training and a training manager, recorded the voice-over. Her clinical knowledge, tone of voice and diction was perfect for the job!

Again, the programme was checked for errors and inaccuracies.

The result of the collaboration is a programme called Medical Terminology (colloquially known as MedTerm). It is an illustrated, interactive course about medical terms, in CD-ROM format, augmented by a workbook. The course is intended primarily for non-clinical staff including medical secretaries, receptionists, clinical coders, staff who work with clinical teams as well as those who work in the financial services sector — especially the insurance industry — all of whom need to have an extensive understanding of medical terminology.

I find it very satisfying that there are still opportunities for the public and private sectors to work together in this way, using their complementary expertise to provide added benefit for all concerned. ■

Pathlore's 'Medical Terminology' is available in stand-alone and client server versions. To run the programme requires a 256 colour monitor, sound card and dual speed CD-ROM drive. It will operate in any Windows environment, along with mainframe and DOS micro applications.

A case study: Medical training for non-medical staff in the insurance industry using CD-ROM

Pinnacle Insurance plc, which employs some 250 people, provides insurance to cover people in the event of sickness, unemployment, redundancy and so on and, in the event of a claim, making repayments on these claimants' loans. These include a range of financial commitments from mortgage repayments to gas, electricity and water services bills. At least 60 per cent of the claims dealt with by the 50 or so staff in the claims department concern accidental disability. The company deals with some 8,000 disability claims a year, or some 3,500 on-going claims each month.

The company has a nurse on the premises and its own chief medical officer who have a thorough knowledge of medical conditions and terminology but it was considered that there was a need for each person in the claims department to have a more extensive knowledge of medical terminology, to be able to read and understand doctors' notes; to understand the claim form used, and to know how to treat each particular claim. For example, it is important for those dealing with a claim to know how long that claimant is likely to be incapacitated and unable to work.

Medical Terminology was added to the programmes in the corporate learning centre and claims department staff were encouraged to work through the course.

Six months after being introduced to Pinnacle's staff, the programme has become a recognised part of the company's staff development and training programme. The course is permanently available and accessible in the open learning centre, so enabling new recruits to include it in their induction training — which helps them to become both proficient and efficient in a shorter time than might normally have been the case. It also gave more experienced staff access to 'just-in-time' refresher training, as and when necessary.

In the past, Pinnacle found that this sort of information is not taught well to a group of trainees. Rather, it is considered to be a subject that people seem to prefer to progress on their own, at their own pace without the distraction or pressure of other learners.

Staff retention and motivation statistics have proved to be encouraging. It has also been noticed that offering staff the chance to take this programme has had a positive, motivating effect on them — which has helped to build loyalty to the company. The staff feel increasingly valued. They feel that they are being looked after by the employer, and are enhancing their learning and their skills by being allowed to study this courseware.

Staff feedback about the programme is very positive. The test results which staff are achieving are exceptionally high but also indicate that their subject knowledge is increasing. This is further confirmed by other business measures including claims decision making.

In addition customer satisfaction levels are also improving.

NETcheck

a personal view of the Internet by Clare Forrest

In this first Netcheck of 1999 Clare Forrest guides readers to sites offering advice about conducting and analysing surveys and help desks.

A New Year already and time to turn the mind to consider pay reviews, attitude surveys and so on!

For those of you who have to construct surveys, especially on employee attitudes, there is a useful site from a company called Expert Survey Systems. The site is at http://www.expertss.com/. The objective of this web site is to provide useful information and resources for anyone interested in organisational surveys, and you are invited to visit, use, and contribute to, this resource for up to date information, ideas, creative approaches, technical papers and training materials.

Expert Surveys have kindly put together a lot of useful information on conducting and analysing surveys covering everything you could possibly want to know — indeed probably more than you knew there *was* to know, for example: Why do a survey?; Philosophy of organisational surveys; History of organisational surveys; Telephone surveys; Online surveys; Fax-back surveys; Confidentiality; Sampling; and so on.

There are demos, downloads and freebies and the whole thing has been excellently designed, in my view, in that it is simple to navigate and quick to load. I do wish more sites would understand that memory heavy graphics and sounds might look and sound fetching when loaded... but that many users get bored and move on before that happens! Yahoo, for example, gets slower and slower to get you where you want to go. Web designers please note: simplicity is the key.

At http://www.expertss.com/newportal.html you can find a fascinating article comparing survey types, which includes this little gemette:

'Published research over the past decade and our own experience lead us to conclude that IVR phone survey results cannot be compared to survey results from hard copy and online surveys. Research and our own experience demonstrate that results from paper and pencil surveys, PC-based administration, e-mail administration, network administration, internet administration, and scannable fax-back forms are largely comparable to one another.'

This tells you everything you need to know really.

On the minus side, the link to the free download of the Adobe Acrobat Viewer needed to access some of the freebies is broken... try this if you haven't already got the extremely useful (and free) viewer http://cgi1.adobe.com/acrobat/download8.cgi

Help desks are big news right now... some help desks being rather better than others, as most of us know through bitter experience. (Anyone else tried to get through to Iomega recently?)

The Help Desk Institute's site at http://www.helpdeskinst.com/ tells you everything you could possibly want to know about setting up and running a help desk, with lots of links to support services resources. You can have HDI news and information delivered to your e-mail account for free; browse the 1998 Support & Service Suppliers Directory Internet Edition for the industry's best software, hardware and service vendors; read the latest Help Desk news to learn about what's happening in the Help Desk industry, including service offerings and programs, tools and technologies, training programs and industry perspectives and select articles from the Help Desk Institute's newsletter, *LifeRaft*.

I had a look at the latest *LifeRaft* article available, entitled 'Understanding The What, Why, When And How Of Benchmarking', by Thomas Cramer, which explains how to look beyond simple numerical comparisons of performance measures to make improvements. The article is excellent and should be read by all those who are benchmarking, particularly those who believe that simply collecting the numbers is what it's all about.

A second useful site for Helpdesk Best Practice — and this time a UK based one — is provided by the Bruton Consultancy. I liked the simplicity of this site and its nice greeting when you access it which simply says:

"Welcome! Help yourself to all the free information, including press articles, helpdesk salary updates, links to other helpdesk sites and information about the work of Bruton Consultancy."

Very charming. The first page includes lots of links, so you can get started straight away — no unnecessary clicking and waiting — to some genuinely useful articles and sources. My favourite, for the title alone, was a press article called 'An Epidemic of Plaque: The difference between corporate mission statements and actual service practice'. Oh yes. Take a look at this site on a regular basis — unlike so many webmasters Noel Bruton, who runs it, clearly keeps it updated so that there's always something new. http://www.bruton.win-uk.net/ is the destination.

Have a great year, and keep those sites coming in please, particularly, give me your feedback so that I can pass it on to the wider community. These views expressed here are only mine — let's hear yours too.

Obituary

We are sad to report that Dr Ernest Rhodes, founder publisher of *Training Officer*, died in December of last year, at the age of 87. In addition to producing *Training Officer* he also published *Mining Technology*, the official journal of the Institution of Mining Electrical & Mining Mechanical Engineers. He was a leading figure in the pioneering work carried out to establish the Stockport, East Cheshire & High Peak Spastics Society in 1953 (now Cerebral Palsy Society). Although he left school at the age of 14 without any formal qualifications he was a keen advocate of their merit, finding time in later life to work for an Open University degree and a doctorate from the University of Nottingham. He is survived by his son and two grandsons.

Dear training purchaser...

The importance of identifying training needs before outsourcing training cannot be underestimated. Here, **Robert Craven** recommends a systematic approach that should be followed to ensure that your training programme is tailored to your company's specific needs.

Robert Craven, MBA, MIMC, CMC, is a trainer and consultant with an international reputation. He is Associate Fellow at Warwick Business School and Visiting Professor at Toulouse Business School. He is Managing Director of The Directors' Centre *a management consultancy and training company.*
He may be contacted on 01225 334560.
e-mail: craven@directors-centre.demon.co.uk

Training programmes need to be tailored to your specific needs. Training needs to take account of the needs of *your* people, *your* corporate culture and the specific functions and tasks that are involved. Your training provider should have experienced personnel with a proven track record. Talk to recent clients and find out exactly what they liked and what they didn't like about the provider. Find out how the client could have got more out of the programme.

It is important to understand the training company. Do they only do off-the-shelf work or do they concentrate on the more bespoke end of the market? Do they focus on the latest fad or are they selling old out-of-date and inappropriate tools? Does the person who sells the work also deliver? Are they simply on a particular bandwagon, for example, ISO9000, EFQM, IIP?

Get to understand the training firm's philosophy and approach to its work. Do its own staff and organisation reflect the skills that they are meant to be showing your people? How much time do they spend trying to understand *your* business and *your* aspirations?

And do they give you an objective view on your business needs or are they simply in the selling game? Are they interested in developing a long term, maybe partnership, approach to addressing your requirements? You need answers to all of these questions. Remember, quick fixes are easy to put in place but miracles (or at least fundamental change) take a little longer!

Most training firms have a systematic approach to addressing client needs. Training companies that I have been involved with follow a five-step pattern similar to the one outlined below:

- *Step one: analysis.* Early meetings are required to build up the rapport and understanding between training provider and client. Discussions about current issues, strengths and weaknesses, enable the training provider to build up a picture of the 'end in mind' and start to set some priorities or key objectives.
- *Step two: indicative proposal.* This gives you, the client, a clear indication of the recommended shape, design, course content and costs of further programme development. This working document becomes a draft proposal and allows the training provider to put forward its recommendations. It also sets the agenda for how the provider wishes to progress the proposal and allows you to comment on how well your needs have been understood and responded to.
- *Step three: programme design.* Programme detail can now be agreed, probably including a fuller, more in-depth training needs analysis (TNA). Working *with you*, the provider can ensure that the programme will effectively fit your company culture and aspirations.
- *Step four: programme delivery.* Who will do the actual delivery? You need to see them (maybe the dreaded beauty parade), as these are the people who are going to interact with your delegates. Where, when, and how will the programme be introduced to the delegates? How will delegates be chosen? And, remember *why* you are putting them through the process and don't forget to tell them!

Ideas, techniques and ready-made activities for busy trainers.

FENMAN'S loose-leaf Activity Packs provide effective ideas, proven tools and techniques and ready-made training and development sessions for improving people's performance at work.

All the activities are:

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- **Great value**

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Or visit our website: www.fenman.co.uk

Team Working Activity Pack

Stuck for ideas to get your teams really working effectively? This pack is full of innovative, fun and stretching activities to stimulate ideas and get teams planning and communicating, evaluating and monitoring performance. These activities provide lots of practical hands-on team working exercises – saving you the hassle of thinking them up yourself!

The aims of the activities are that participants should be able to:

- work better as a team
- plan tasks efficiently
- solve team problems more effectively and creatively
- communicate better
- understand other team members' work, needs and wants
- understand the typical characteristics of effective teams and team leaders.

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Managing Tricky Situations Involving People at Work

18 activities for ensuring managers are professional, assertive and effective when handling difficult people situations. Like when:

- an angry employee storms out of a meeting
- you're trying to bring round an awkward team member
- you've upset a colleague and want to salvage the situation
- there's damaging office gossip doing the rounds
- you're aware of a colleague's difficult personal or work-related problem
- you've got the job of re-motivating a dis-heartened or cynical team
- you've got to work professionally with an individual you'd rather not have to work with.

All these awkward situations take up a lot of emotional effort and waste valuable hours. Performance suffers. The manager and the team suffers. But there are proven step-by-step methods for dealing with these really tricky problems.

Give your managers and team leaders proven, step-by-step problem-solving frameworks to help them deal professionally with awkward situations involving people at work. And help them get performance back on track with the minimum of disruption.

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Skills of Appraisal and Performance Review

19 activities for achieving positive results

Implementing a new appraisal system, or updating and improving the one you have? Here's all the ready-made workshop material you need to get everyone practising effective appraisal skills.

Also includes specialist sections on:

- Understanding the perspective of the appraiser
- Understanding the perspective of the appraisee
- 360° approach to appraisals
- Linking appraisals and reviews with Investors in People
- Performance pay
- Appraisal and personal development
- Appraising manual workers.

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Team Working Activity Pack

Please send me the pack shown overleaf for £159.00 + £4.80 carriage.

I understand that if I decide to return the pack(s), I must do so within 10 days using a courier or recorded delivery service. My invoice will be cancelled, or my money refunded, whichever is appropriate. I undertake not to photocopy any of the material unless I decide to purchase.

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16 activities for ensuring managers are professional and effective when handling difficult people situations.

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19 activities for achieving positive results

Skills of Appraisal and Performance Review

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- *Step five: evaluation.* Level One evaluation (aka 'Happy Sheets') is fine and dandy but does not really tell you about impact on the bottom-line. Finance Directors will not continue to ratify training budgets unless some impact on bottom-line performance can be demonstrated (both formally and informally). Evaluation must reflect the original objectives of the programme and there must be a feedback mechanism so that your organisation learns how it could have managed the whole process more effectively.

If your training provider is following a process similar to the one above then you shouldn't go far wrong; but the centrepiece is probably the TNA, so I want to talk a bit more about this process.

Identifying training needs is the process of analysing training requirements as a basis for preparing the training programme itself. What you are essentially doing is identifying the gap between how things are and how you would like them to be. The gap is the difference between how the organisation is performing and how it *should* be performing; what people know and *can* do and what they should know and *should* be able to do; the gap between what your people *actually* do and what they *should* be able to do.

I hope I have given you some insight into how to approach your training requirements.

Conclusion

All too often people buy training because they believe that it is a *good thing* like motherhood and apple pie. Do not buy training just because it's what your people need. Please be clear about what you are trying to achieve and how the training will benefit the organisation. Otherwise don't bother; I'm sure that I can find plenty of effective ways of spending your money. ■

Call for Papers

29th IFTDO World Conference
3-6 April 2000, London

The Institute of Personnel and Development (IPD) is hosting the 2000 IFTDO World Conference — The HRD Challenge: Facing a Certain Future. The IPD is seeking session proposals from academics, consultants and practitioners working in the field of human resource development.

Seminars are intended to give delegates the opportunity to take away key points that will assist them in performing their jobs or help their organisations develop and grow. Each seminar will be one-and-quarter hours in duration.

For details contact Lisa DiVito, World Conference Programme Co-ordinator by fax 0181 263 3223 or e-mail: conf@ipd.co.uk

Human Resource Development Week

Olympia, London 13-15 April

This year's Human Resource Development Week conference and exhibition runs from 13–15 April at Olympia, London. Now in its thirteenth year, some 300 suppliers of products and services will exhibit. A dedicated area in the Management Centre will provide advice and information in areas such as professional qualifications, executive development, open learning and leadership skills. There will also be a series of themed 'villages' covering multimedia, HR and training software and assessment and psychometric testing.

The theme of the conference is 'Training Matters'. In a keynote address Dr Robert Greenberg will be examining the link between the world of music and business. The conference will feature a series of 'masterclasses', including sessions on coaching skills and the future of work. Delegates will be able to choose from over 30 seminars grouped into four streams. They will focus on enhancing performance, realising potential, creativity in training and future developments.

For further details or to book, call the IPD Conference Hotline on 0181 263 3434 or visit the IPD's website: www.ipd.co.uk

Sex Equality in the Next Century
A series of Conferences

23 February 1999, CBI Conference Centre, London
3 March 1999, Glasgow Moathouse
9 March 1999, Hilton National Garforth, Leeds

The present Government are committed to bringing in new anti-discrimination legislation in 1999 which means employers must keep up-to-date on these issues. These conferences, organised by the Equal Opportunities Commission's Equality Exchange, will:

- **Provide up-to-date information on aspects of the Sex Discrimination Act.**
- **Be an opportunity for delegates to discuss these issues with expert speakers.**
- **Provide a forum for networking with other employers and fellow professionals.**

Subjects to be included are Developments in the Sex Discrimination Act, Developments in Human Rights including the European Dimension, Developments concerning the Employment of Transsexuals and Maternity Legislation. A choice of workshops is also available.

Speakers will include Lord Lester of Herne Hill, QC, who will discuss the wider context of the need for coherent reform of anti-discrimination legislation; Laura Cox, QC; Pauline Matthews, Principal Legal Officer at the EOC and Doris Littlejohn, President Employment Tribunals (Scotland).

Cost of attendance, including paper and refreshments, are £170 + VAT per delegate for Equality Exchange Members and £195 + VAT per delegate for non Equality Exchange Members; a limited number of places for Voluntary Organisations are available at £75 + VAT per delegate.

Further details are available from
White Rose Conferences on
01709 828181 (Telephone)
or 01709 828732 (Fax)

EQUALITY EXCHANGE

WHAT'S NEW

Here's a quick round-up of recently released training resources. In addition to details of video- and text-based training packs, we have also listed audio, CBT, CD-ROM intranet and Internet programmes, along with open courses.

Apparel and leathergoods

CAPITB Trust (0113 227 3345) has developed two interactive CD-ROMs to help manufacturers improve the speed and effectiveness of staff training, *The Maintenance and Adjustment of the Lockstitch Sewing Machine* and *Pattern Cutting and Grading* training packages were developed in response to diminishing college provision in some areas of the country, together with feedback from industry that indicated a need for training to be more flexible. The CD-ROMs, which can be used in conjunction with National/Scottish Vocational Qualifications (N/SVQs) standards, will be of interest and value to new entrants to the industry and Modern Apprentices and National Trainees who require underpinning knowledge in these particular areas.

Apprentice courses

Lindley Training Consultants are running a new series of 'open' apprentice courses at its Peak District centre. Apprentices attend a one-week outdoor training course as part of their personal development. Included in the courses are teamwork, communication, personal challenge, leadership and support exercises. At the end of each day the exercises are discussed and reviewed. For further information call Lis Dales on 01433 620377.

Assessment tools

Mta Select consists of experiential assessment materials that provide participants with opportunities to demonstrate specific skills and competencies. It also provides assessors with opportunities to observe participants whilst they work. The pack is designed for use with graduates and junior and middle managers in recruitment and selection, assessment centres, and career development workshops. Comprising eight activities the pack also includes full support to help assessors plan and integrate the whole process and observe and evaluate participants. For further information call Mta International on 01937 844800.

Authoring component

Asymetrix Learning Systems Inc (0171 345 1500) provider of Internet-based enterprise learning solutions, has launched *ToolBook II Instructor 6.5*. This courseware authoring product for professional developers allows delivery of interactive courses over the Internet, corporate Intranet, Local Area Networks, or CD-ROM. With this release, *Instructor 6.5* introduces enhanced deployment of applications to the Internet using native HTML and Java, new compression technology for faster course delivery over the Internet, new multimedia learning objects, and ease-of-use templates.

Broadcast and communications technology

With the accelerating pace of new product innovation, the call for training in broadcast and communications technology is ever increasing. To continue to meet this need, Sony Broadcast & Professional have just announced their new Annual Training Schedule for 1998/9, which has been expanded to include *ES3 Operational training*, *CCTV* and *Display* courses. *ES3 Operations training* is part of The DVCAM Combination course, which offers delegates hands-on experience of all functions and features of this Edit station, covering all aspects of system build and configuration. The aim is to provide potential or existing users with knowledge and experience of all editing functions, operations and menus. The *CCTV Sales Training* course is an intensive one-day course open to newcomers in the industry, offering a theoretical and hands-on overview of the complete Sony CCTV product range. The Displays Projector Set-Up and Installation training, which is also open to industry newcomers, covers the core features of both Sony CRT and LCD Projector ranges. Training courses can be delivered on the customer site or in dedicated training facilities with Sony Weybridge or Basingstoke offices.

Built-up roofing

Built-up Roofing from The Construction Industry Training Board is a new resource package for use by those training built-up roofing operatives. Comprising 270 loose-leaf pages of text and illustrations that can be photocopied and used as trainee handouts, it covers broadly the contents of the NVQ level 2 qualification. The pack has been written by Francis Marsh and comprises a number of sections, each subdivided into specific subject areas, which can be delivered progressively or on a modular basis. It is flexible enough to be used by anyone involved in the training of built-up roofers, whether in college or as part of an on-site instruction programme. It should also be a useful resource for specifiers who require detailed installation techniques. For further information contact CITB's publications department on 01485 577800.

CCTV

Instrom Limited has announced the second generation of *STAM Insight* in its range of CCTV training programs available on CD-ROM. *STAM Insight* provides education on all aspects of CCTV from very basic principles through to system design and installation of components. The multimedia programs — *Ultimate*, *Workmate* and *Infomate* — are designed to assist end users, specifiers and installers to understand and assess their knowledge of the complex technology and issues critically involved when specifying or designing a CCTV installation. The programs enable technical and non-technical people to examine the world of CCTV by calculating, viewing, pricing, drawing and pre-testing their requirements, and to test their understanding and assess the knowledge they have gained. For further information call Ken Graham on 01908 261900.

Confined space rescue and emergency procedures

Aimed at all those who may be required to enter or supervise others in confined spaces, the new Draeger *Emergency Procedures in Confined Space* training course explains the procedures that are necessary when carrying out emergency first aid and rescue operations. By combining confined space entry with search and rescue techniques, the course ensures that, in the event of an incident, trained personnel can administer first aid and, where necessary, provide oxygen resuscitation, before carrying out a safe rescue. Held at Draeger's purpose-built

confined space training centre in Blyth, Northumberland, the two-day course covers current legislation as well as specified risks and hazards. Where appropriate, the course can also be custom designed to suit the specific needs of customers and be held at their own premises. Further information is available on 01670 352891; fax 01670 356266.

Creativity and accelerated learning

Brain training company, Illumine Ltd (01753 719926) has added Edward de Bono's creativity courses and a new *Accelerated Training* course to its range of training programmes. The range of practical thinking and learning skills courses will include Edward de Bono's lateral thinking and six thinking hats, the new *Thinking Styles Psychometric Test* and a new course that will help trainers to take advantage of accelerated learning approaches.

Developing selling skills in customer service

Fenman (01353 665533) has launched a new activity pack entitled *Selling Through Customer Service*, which encompasses 19 tried and tested activities for boosting sales and pleasing customers. It has been designed to help all staff having contact with customers to achieve or contribute to higher sales. The activities cover both face-to-face and telephone contact. The pack aims to help dispel the myth that customer service staff do not see themselves as salespeople and that selling is a dirty word.

Employment law

Employers will need expert legal advice to keep them on the right side of the law as new legislation on working time, the minimum wage and data protection comes into force, says the Institute of Personnel and Development (IPD). The IPD and JSB Training and Consulting have developed a new *Advanced Certificate in Employment Law* for people management and employee relations' professionals as well as lawyers and trade union officers. The flexible 13-day modular programme has been designed to help delegates guide their organisations through the potential minefield of recent legal changes.
The certificate features modules on Employment Contracts, Practical Maternity Law, Employment Tribunals, Discipline and Dismissal, Health and Safety, Business Transfers and Trade Unions. Further details are available on the IPD training hotline on 0181 263 3434 or on the IPD website on www.ipd.co.uk
The course runs throughout the year and training days are held in London.

Executive development

Henley Management College has announced a new package of executive development programmes. The short courses range across key development areas for managers, from core activities such as *Executive Project Organisation, Negotiating Skills* and *Putting Strategy into Action*, to specific challenges addressed by *Successful Multicultural Teamworking* and the *Henley Executive Language Programmes*. The needs of managers, up to top levels, are met by the *Senior Management Programme, The Leadership Programme* and *Strategic Management for the Board*. A copy of Henley's Executive Development Programmes 1998-1999 brochure is available from Sharon Crabtree on 01491 571454.

Expert Advice for NVQ Assessors

The NVQ Assessor Toolkit

for professionals and newcomers to NVQ assessment

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Over 180 photocopiable pages

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What do you get in The NVQ Assessor Toolkit?

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The NVQ Assessor Toolkit has 4 main sections and 50 tools which help you cover the task

Section 1 Building Knowledge
Understanding the Basics, Understanding the Qualification, Understanding Learners and Understanding your Role.

Section 2 Developing Skills
First Encounter, Observing Performance, Assessing Documentation, Forensic Questioning, Feedback and Review, The Portfolio, Assessment Hazards.

Section 3 Self Assessment
Personal Audits.

Section 4 Reference
Glossary, Standard Forms, HELP guide.

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POST TO FENMAN, FREEPOST CB12, Ely, Cambs CB7 4BR (no stamp needed) TJ1/99

Interactive Whiteboard

First Rental (01763 247251), specialists in electronic equipment rental, has introduced a dual-purpose, computer-linked whiteboard to its line-up of electronic products. The *Softboard Model 203* is a castor mounted whiteboard capable of being manoeuvred between rooms. It provides computer storage and retrieval of hand-written material. Material written on the enamelled steel surface is captured and displayed on a computer in colour in real time. The content can be saved, printed or exported to any Windows application. Playback on to the screen is offered in real time. In Front Protection Mode, the *SoftBoard* becomes an interactive display screen enabling the presenter to take control at the screen of any Windows based application.

Lightweight LCD projector

Sanyo's *PLC SU15*, a small and lightweight multimedia LCD projector, is now available from visual communications company MarCom Systems (0181 891 5061). The projector projects 600 ANSI lumens of brightness even in well-lit environments, so there is no need to dim the lights. A special feature of the projector is that it doesn't have to be connected to a PC. Users can save JPEG, BITMAP, Powerpoint and Digital Still Camera images and presentations on the free PC card that comes with the projector and replay them by putting the card in the projector's built in PCM-CIA slot. Other features of the projector include a digital magnifier with panning facility, which allows an area of the image to be expanded, while the remote power zoom and focus function enables the user to fine tune the image quickly and easily for accurate set-up.

Line manager as developer

A new programme from Roffey Park (01293 851644), *The Manager as Developer*, is aimed at line managers with technical or operational expertise who want to help 'average' performers in their teams to raise their game, and consistent under-performers to reach their full potential. The programme deals with real-life situations and provides an understanding of coaching and counselling, giving participants the opportunity to practise core skills such as active listening and questioning techniques as well as giving and receiving feedback. The programme is divided into two stages, with a three-month gap inbetween to allow managers to practise their skills back in the workplace. Roffey Park offers a telephone helpline to support the participants through this phase.

Mediation Training

Designed for in-house training, *Mediation in the workplace* is a new course from Professional Mediation Resolutions (01926 339744). With accreditation by the Open College Network and the RSA, the course is presented in either a 3- or 6-day unit. Amongst the topics included are skills training in facilitating a six-step mediation session, conflict resolution skills and strategies on how to handle personality clashes in the workplace.

Multi-skilling

Businesses wishing to upgrade levels of Health and Safety at work can now benefit from a new training programme called *Multi-skilling*, offered by Eastern Electricity's Business Development Team. This course allows engineers or technical staff to gain a National Vocational Qualification (NVQ) in Engineering Maintenance and/or Technical Services. It comprises ten modules, which can be tailored to suit the particular needs of a business and its staff. The BDT offers a wide range of training courses, including *Electricity at Work Regulations, Basic Electrical Theory. Cables and their Application, and Appreciation of IEE Wiring Regulations*. For further information call the BDT training hotline on 01707 282928.

New web site puts qualification on-line

To increase awareness of National and Scottish Vocational Qualifications (NVQs/SVQs) and the benefits they offer, awarding body Qualifications for Industry (QFI), has launched its own web site. The site, which can be found at www.qfi.co.uk offers employers, individuals and approved centres up-to-date information about QFI and its portfolio of NVQs/SVQs.

Recruiting and retaining staff

A new best practice guide for employers on recruiting and retaining staff has been produced jointly by the Institute of Personnel and Development (IPD) and the Department for Education and Employment. It brings together all of the key steps needed to recruit new staff and gives advice to employers on how then to keep them. The Guide is both an *aide-memoire* for those employers who already feel that they are well versed in recruitment and retention techniques, but also provides step-by-step help for those who are not comfortable with recruitment practices. The Guide will also be available on the Internet and as a CD-ROM. The Guide on recruitment practice will be available shortly through Jobcentres, Training and Enterprise Councils and Business Links. It will also be available on the Internet at www.open.gov.uk/dfeehome.htm

Small business management

Buckinghamshire Business School is to offer a Degree in Small Business Management, specifically aimed at managers of small- and medium-sized businesses. The programme will incorporate skills workshops, tutorials and distance learning, coupled with work-based assessment. For further information call Nigel Cox on 01494 522141.

Support group for trainers

Training Exchange is a new support group set up to enable trainers to pool their ideas, develop portfolios of useful material — role-plays, case-studies, instruction, exercises and games and learn from one another. Members will receive up to fifty items of training material each year and have unlimited access to a growing database of hitherto unpublished ideas. The group will also run Trainers' Workshops. Membership is available to all professional trainers, although preference is given to those who have a qualification in training or education, or are working towards membership of an Institute. An application to join must be accompanied by one item of training material. Members retain the copyright of their material and it is distributed throughout the organisation on the understanding that it is only for the use of members of *Training Exchange*. For details of membership, contact Brian Holley on 01453 860424, or e-mail him at *trainex@hwpartners.co.uk*.

Brian Tucker reviews

Brian Tucker is Company Secretary and Co-ordinator for The Forum for Technology in Training, and a technology based training consultant. He may be contacted on 0151 342 8606.

EFFECTIVE INNOVATION
Maxim Training
CD-ROM and workbook

This course, produced by Maxim Training in conjunction with John Adair, deals with the subject of effective innovation in a very cogent manner. Those who think that you cannot teach soft skills using technology should look at this programme.

The course is led by John Adair who appears on screen either as a video head and shoulders or as a person shown against the background screen. Three other people are used as experts and in case studies and this gives credibility and interest to the course.

Effective Innovation is not just about creativity, although this is dealt with, but looks at innovation and team innovation. I learned from this course and I would have regarded myself as innovative!

The programme uses a good balance of video, audio and graphics to support the text. The navigation is intuitive, but there is a tutorial at the start if you need it. The amount of interacton is good and the control of the pace of the course is very much in the learners' hands. Another good feature is that you always have on screen an indication of where you are in the course. However, I was so engrossed in the learning that I didn't take much notice of this aspect.

There is a handy workbook to go with this course, which also contributes to certain performance criteria of the management standards, as defined by Management Charter Initiative, and the links to IiP Assessment Indicators.

The course is essential learning for both team members and those managing creative teams.

ORGANIZE FOR SUCCESS
Focus Multimedia
CD-ROM

When installing this course, it suggests loading to a directory C:\organize. If you are a Lotus person and use Organiser, then it will load it to that directory, unless you tell it otherwise.

The course deals firstly with the elimination of clutter. So many of the organising/time management courses only deal with the work system. It was a refreshing change to find a course that helps you to sort out yourself, and your work area, at the same time as teaching you how to get organised. The other piece of learning is about staying organised. Many people learn how to get organised, but it doesn't always last.

The course is well laid out and allows you total freedom to choose your own way through the material. Its basic structure has three chapters, and within these you have four options: Learn, Evaluate, Explore and Apply. Within 'Learn' you get the instruction; within 'Evaluate' you carry out self-assessment exercises to test your understanding; within 'Explore' you are able to hear about good and poor application of the skills; and within 'Apply' you are involved in helping two people to understand what they must do. There is a print facility that allows you to print off the key learning points for review later.

I found this to be a good piece of training material that could stand alone, but would be better with support from a supervisor. A must for anyone who is disappearing under the weight of paper, and very good for most of us.

KEY SKILLBUILDER
Application of Numbers - Level 2
National Extension College
CD-ROM with tutor support

The technical information with this product says it can be run on a 486 DX2, although it does recommend a Pentium 166. Installing on a 486 was very slow. The piece of technical information that is not given is that it will take a GigaByte of hard disk space. Having said that, it will be used with an NEC tutor, who will be aware of these constraints.

The course has a preview, which explains the navigation and how to use the course. The learning is set up to allow completely free choice of work, although the tutor will usually be giving some guidance. The main menu screen has four main options: Develop your skills; Test your skills; Hear about numbers in real life; and Refer to the Key Skill Specification.

The first item 'Develop your skills' is subdivided into three areas: Pick a Technique Element 2.1 – Collect and record data; Element 2.2 – Tackle problems; and Element 2.3 – Interpret and present data.

'Test your skills' is self-explanatory, although the questions aren't so easy, they really do test your skills.

The 'Hear about numbers in real life', has six people talking about their lives and how numbers are involved in their daily routine. This helps to put the need for understanding of numbers into perspective.

The 'Refer to the Key Skill Specification' takes you to the same three elements as in 'Develop your skills'.

While the learner works through the 'Develop your skills' section, there are frequent hints and plenty of activities to consolidate the learning. It has a print facility, so that the learner can print off the completed activities to discuss with their tutor later. The tutor has the facility to switch on or off model answers to the activities.

There are on-screen gadgets to help the learner. There is a quick calculator, a standard calculator and quick adds and multiplies. The learner can also change the size of the font, which I think is a very good idea.

There is a wealth of very good material in this course. So much that it was not possible to review it all. I had to sample bits here and there. Maybe that's why I didn't do so well in the test. This is essential learning for anyone who is not sure about their ability with numbers.

Leslie Rae reviews

Leslie can be contacted at Ellray Associates, 29 Laburnum Grove, Sheffield S21 1GR, tel 0114 248 3725

THE EVALUATION TOOLKIT

David Simmonds
Fenman, ringbinder, £195
ISBN 1 872483 62 3

This collection is neither a set of supportive activities, nor is it a series of guidelines and material to run training workshops, the usual two types of collections. In many ways it falls between these two and provides a series of resources that can be used as tools, instruments and techniques for carrying out evaluation at a variety of levels, and wider than straightforward training. The author compares the collection with a set of home tools that never seems to contain the right one for the task: in this case the toolkit provides the right tools.

The 40 resource sections cover a wide range of validation, evaluation and assessment material and include several resources concerned with TNA also assessing NVQs, portfolios and accredited prior learning. A substantial section is devoted to assessing knowledge learning by written tests; assessing skills with checklists, practical tests and simulations; and assessing attitudes with role-play, CCTV and questionnaires. An approach to cost analysis is included, although the approach to value analysis is rather simplistic and naïve. Another substantial section is concerned with transferring assessment to the workplace.

Many of the resources are fairly basic and easily to use, and trainers will be able to play tunes on them to customise them to their particular requirements. Care will have to be taken with some of the resources, which do not take account of up-to-date thinking on evaluation. For example, in the section on end-of-course reviews there is undue emphasis on tick sheets — very easy to analyse (as far as this analysis goes), but only too easy for a learner to race through, putting ticks wherever. In fact the section is entitled 'The Happy Sheet'. The behaviour analysis approach is a copy of the Behaviour Analysis of Warr, Bird, Rackham and Honey, but without reference to them, and takes no account of more recent attitudes to behavioural analysis categories — for example, the differentiation between different types of disagreement and the implications of these differences. Similarly there is no mention of the finer shades of other categories, such as the various ways proposing affects behaviours.

However, in spite of these and other minor criticisms, the collection can form a good basis on which trainers can build their skills in validation, evaluation and assessment.

SELLING THROUGH CUSTOMER SERVICE

Tony Gillen
Fenman, ringbinder, £159
ISBN 1 872483 61 5

This 'traditional' collection of training activities, designed to be used as support events for training programmes, is concerned completely with caring for the customer, whoever he or she might be. In recent years there has been greater emphasis on customer service, encouraged by greater competition for a wider and thinner spread of purchasing power among buyers, i.e. customers. Establishments that treat their customers unreasonably or require that they have to make the efforts, quickly find their revenue decreasing. This is still happening on a fairly wide scale, in spite of all the emphasis in recent years on improving their service. The withdrawal of customer interest is rarely as a result of a complaint — many customers withdraw their custom rather than complain and the organisation continues to think it is doing a good job, in spite of reducing income. So all organisations must look to their customer services and not assume that all is well.

The 19 activities of this collection can stand alone or be used as part of a larger training programme; they can be used as they stand or have parts selected for addition to the trainer's own material. All the activities follow the same format, which consists of an outline of the content, the purpose, where it can be best used, what happens, the time required, materials and resources (including OHP slide masters, handouts and flipchart masters), preparation for the activity, and a step-by-step description of the activity.

The activities cover a wide range of customer care services, from enabling participants to recognise how they can increase sales with high-quality customer care, positive sales attitudes, preparing to sell, considering customer needs and their personalities; through sales resistance, sales conversations, handling objections and customer handover; to telephone services and measuring staff success.

A very useful collection of effective and useable activities for the customer care trainers' practical libraries.

TRAINING SESSIONS ON OCCUPATIONAL SAFETY

Geoff Morris and Dennis Ashton
Gower, ringbinder, 495 pages, £225
ISBN 0566 07910 0

New types of training event requirements can be hoisted on trainers at very short notice, usually because of organisational expediency and frequently on subjects about which the trainer has little or no knowledge. Health and safety aspects are frequent examples of this, commonly as the result of a threatened inspection, a just-avoided, or even the result of an accident incident. The edict is then sent downstairs, "We want safety training, now". In such cases this publication is one to which the trainer can turn with confidence. Seventeen training sessions provide comprehensive, clear and practical guidance to mounting safety courses that can range from half a day to more than a week.

The sessions provide training material for the non-safety-specialist and the safety professional alike and they range from induction, risk assessment, organising for safety; through dealing with accidents and safe lifting and carrying; to safety in the office, personal protective equipment, and auditing and improving safety.

The book's intention is not to convert the trainer into a

TRAIN YOUR PEOPLE AND WHACK THE COMPETITION
Norrie Gilliland
Gower, paperback, 220 pages, £18.99
ISBN 0 566 07844 9

Training, like so many services and commodities, is an expensive, albeit essential, activity. With so many organisations having to pull in their horns at the present time there is always the danger (as there always has been in such situations) of training becoming a cost-victim. This is a particular problem for small businesses who not only have to consider the direct costs, but also in so many cases find that training is a difficulty because of the small number of employees. This has usually resulted in the use of external providers — a costly business that made many turn away from training altogether. The author of the book has worked with many small businesses and aims to give particular guidance for minimal training budgets and limited available time, to smaller and medium-sized businesses.

The 'how-to-do-it' is covered in an introduction and 11 chapters, ranging from: Do you know where you're going to? (visions); Oh no, not the dreaded business plan (Oh, yes); Right people, right place, right time (recruiting and inducting effectively); Needs, motivation and learning; Plan for learning (TNA, communication, on-the-job training, coaching, customised training); Developing managers; Effective communication; Change and innovation; How will you know it's working? (evaluation); and Next steps (involving people, working with TECs and LECs and other intermediaries).

The book is written in a clear, straightforward and as jargon-free way as any technical book can be, with many bullet lists, checklists, guidelines and appropriate cartoons provided by Ben Mullen. The book ends with five case studies of small business approaches (150, 17, 68, 19 and 54 employees). The book is well recommended to forward-looking managers in small and medium-sized businesses, but is equally valuable to the needs of larger businesses. Trainers and consultants will find much to help them and the businesses in these ranges with which they have contact.

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safety professional and the point is made strongly, that by preference a safety specialist should be involved. The Health and Safety regulations require a deliverer of training to be 'competent' in the subject, i.e. to have a sufficient level of knowledge, training or experience, so some health and safety background is essential. It may be that the training professional may have to give a health and safety specialist some training skills so that effective training can be carried out.

Each of the 17 sessions is designed for half-a-day's training (four hours), although most sessions can be broken down into smaller units. The sessions can therefore be manipulated to suit the needs of the learners and the organisation by construction of an event as a short or extended programme. They are not all talk and chalk sessions, but contain a variety of approaches. Each session material follows the format of aims, time, background, preparation, trainer's guide, session notes, OHP masters, task sheets for exercises and handouts, and each session contains at least one practical activity. The book is rounded off by a series of 17 tests that relate to the sessions; tests that can be used both pre- and post-training.

If you are, or are to be involved in safety training in any capacity, this collection of training material is essential.

TAKEWAY MANAGEMENT TRAINING ON THE NET
Echelon Learning Ltd
Internet library of management training modules on www.learningmatters.com. Five-hundred 'bite-sized' chunks with costs ranging from £15 for a single activity purchase to £6 per module for multiple buys.

This is the first, and it certainly won't be the last, approach to making activities available to trainers on the Internet, rather than restricting them to purchasing the huge collections of activities available. The website www.learning-matters.com brings up a number of buttons that lead you to a 'Word search'; a 'Browse by topic'; and a 'Browse by pack'. These lead to the type of activity sought and a 'Thumbprint' is displayed. This shows the activity name; the pack name; the audience; the number of pages in the activity; the timing of the activity; number of participants; purpose; learning method; benefits; additional materials; and links to other relevant activities. The selected item can be put in a shopping basket, purchased by credit card and made available for downloading as a PDF file sent by e-mail. Simple to use (even I was able to cope first time!)

At the time of writing this review (December '98) there were 500 activities (self-study and facilitated activities) available for purchase as single units or in multiples; or, if preferred, in traditional published collections, with 1000 on offer by January 1999. In the published versions, each collection includes 30 to 40 activities and covers such subjects as 'Career Planning'; 'Confidence Builders'; 'Performance Management'; Vitalizers; and so on.

This is an innovative project that offers immediate availability of a number of activities to Internet users, albeit at a price — telephone call, £15 as opposed to, for example, £174 for a published collection (30 x £15 = £450 on the Internet for all the activities). But it offers choose and buy facilities that although more expensive pro rata, are cost-saving, if not all the collection activities are required. Visit the site and try it out.

Watch this space as there are soon to be other Internet offerings available.

Steve Holman reviews

Steve is Senior Lecturer at Manchester Metropolitan University, Department of Retail and Marketing. He may be contacted on 0161 247 3989.

SUCCESS WITH PSYCHOMETRIC TESTING
Derrick White
Management Books 2000 Ltd, paperback, £12.99
ISBN 1 85252 248 8

This A5-size book is an exciting and interesting read that helps to unravel the mystique around psychometric testing. It reminds the readers of the origins of personality assessment by reference to the ancient Greeks, when Hippocrates divided people into four humours, Choleric, Sanguine, Phlegmatic and Melancholic. This may initially frighten off the less discerning reader but it should not. The book is written in simple language, with full and humorous explanations, almost simplistic in some cases, with practical examples that give linkage and a depth of understanding to the subject area.

The growth of psychometric testing in business, demands that every businessperson has at least an awareness of what it is and how it works. The potential and limitation of the procedures are essential tools in the modern manager's survival kit. Psychometric testing can help to support the decision-making process by underpinning it with validity and reliability, essential features in, for example, recruitment and selection.

This book gives the lay person the opportunity to acquire an understanding of the subject and enjoy a good read. I strongly recommend it to all students in the field of management and business, including those specialising in any of the aspects of psychology. For HR and training personnel it is a must and it should be passed around to all departmental managers.

There is a small index section and some referencing but the bulk of the text is based around the knowledge and experience of the author, who is a professional training consultant and practitioner.

PIECING TOGETHER THE JIGSAW
Julia Phillipson
Central Council for Education and Training in Social Work, paperback, £8
ISBN 1 85719 202 8

This specialist A5-size publication is targeted at individuals who may be involved as mentors or assessors, providers of training or education, senior managers, or any other responsible persons who have the difficult task of developing social workers. The work comes from a project by the Central Council for Education and Training in Social Work and South East England region's training providers, to identify good practice in staff development for internal assessors and other roles. As well as identifying good practice it explores common competencies with special reference to Teaching Awards and moves towards a strategic approach in the area.

Following the recent tragic examples in the national press and TV of failures in the social care system, this text is a welcome, professional attempt to put current training and development practices into context. To a lay reader the concepts and apparent complexity of the subject are daunting. This in itself is a sad reflection on the profession. However, the book does clearly outline, in simple stages, what is going on for social work and care organisations; it then sets the scene, giving responsibilities, names and roles, of who is affected by the new emphasis on workplace learning, its effects overall, support systems and the need for corporate strategy.

Each section gives further reading and references and there are easy-to-follow tables, which put the 'jigsaw' together. I particularly liked the paragraph titles, for example, 'What does a mentor/assessor do?'; this layout aids study and understanding.

The report recognises that developing and sustaining a culture of learning and critical reflection is essential to developing effective and competent workers and managers and in managing change. This is precisely the same for all organisations.

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DATE & VENUE	EVENT	CONTACT
15-16 February London	**Performance Appraisal Skills**	IPD Training hotline, tel 0181 263 3434.
17 February Loughborough	**A Behavioural Safety Toolkit**	Joyce Bostock, Centre for Hazard & Risk Management, Loughborough University, Loughborough, Leicestershire LE11 3TU; tel 01509 222175; fax 01509 223991.
18 February Birmingham	**Monitoring and Evaluation: essential tools for EU-funded projects**	The European Briefing Unit, University of Bradford, Bradford, West Yorkshire BD7 1DP; tel 01274 233820; fax 01274 235820.
23 February Sutton Coldfield	**Ideas swapshop and accelerated learning techniques**	David Brake, 17 Playses Green, Hambridge, Langport, Somerset TA10 OAP; tel/fax 01460 281600.
23-26 February Cardiff	**Creative Approaches to Training Course Design**	Mike Idziaszczyk, Development Associates Group Ltd, Blenheim House, Fitzalan Court, Newport Road, Cardiff CF2 1TM; tel 01222 264500; fax 01222 264505.
25-28 February Leamington Spa	**Mediation Skills Training**	Professional Mediation Resolutions, Nora Doherty & Associates, 20 Gaveston Road, Leamington Spa, Warwickshire CV32 6EU; tel/fax 01926 339744.
1-2 March London	**Building a Learning Organisation**	IPD Training hotline, tel 0181 263 3434.
6/7 March Herts	**TA modular programme — Why tell stories?**	A D International, Sherwood House, 7 Oxhey Road, Watford, Herts WD1 4QF; tel 01923 224737.
8-9 March Worthing	**Effective Telephone Skills**	MSS Axion, 11 Heene Place, Worthing, West Sussex BN11 3NL; tel 01903 266675; fax 01903 694883.
10 March Loughborough	**RSI: From Prevention to Litigation**	Joyce Bostock, Centre for Hazard & Risk Management, Loughborough University, Loughborough, Leicestershire LE11 3TU; tel 01509 222175; fax 01509 223991.
15 March London	**Proficiency in corporate stress management training**	Carole Spiers Associates, Gordon House, 83-85 Gordon Avenue, Stanmore, Middlesex HA7 3QR; tel 0181 954 1593; fax 0181 907 9290.
25 March Surrey	**The Role of Culture in Modern Business**	The Centre for International Briefing, Farnham Castle, Farnham, Surrey GU9 OAG; tel 01252 720417.
12-13 April London	**Performance Measurement for Web Based and Intranet Training**	Katy Holgate, Access Conferences International, Southbank House, Black Prince Road, London SE1 7SJ; tel 0171 793 4122.

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